DOCUMENT RESUME

ED 289 982 CE 049 247

TITLE	A Study of Occupational Opportunities for Chicago Youth. DACUM Task Analysis and Survey Verification. Locally Verified Task Lists.
INSTITUTION	National Alliance of Business, Inc., Washington, D.C.
SPONS AGENCY	Illinois State Board of Education, Springfield. Dept. of Adult, Vocational and Technical Education.
PUB DATE	87
NOTE	179p.; For a related document, see ED 287 099.
PUB TYPE	Guides - Non-Classroom Use (055)
EDRS PRICE	MF01/PC08 Plus Postage.
DESCRIPTORS	Auto Mechanics; Carpentry; *Clerical Occupations; *Competence; Competency Based Education; Cooks; Curriculum Development; Drafting; *Job Analysis; *Job Skills; *Occupational Information; Postsecondary Education; Secondary Education; *Task Analysis; Vocational Education; Word Processing
IDENTIFIERS	*DACUM Process

ABSTRACT

This document contains the new and verified task lists for 10 occupations: shipping and receiving clerk; general office clerk; billing, cost, and rate clerk; order clerk; accounting clerk; typist/word processor; drafter; cook; automobile mechanic; and carpenter. The DACUM (Developing a Curriculum) process task analysis and survey verification and the sample questionnaire are included for the first four occupations. The four DACUM task lists were developed using the DACUM approach. Panels of expert workers within an occupational area were asked to identify job competencies such as knowledges, skills, and abilities required to perform the job successfully as a basis for competency-based curriculum development. Approximately one week after the panel was conducted, each panelist was mailed a task analysis and survey verification form containing a list of task statements and job competencies identified during the task development process. Panelists ranked the skills in order of importance and added other skills as needed. The National Alliance of Business worked with the Chicago Public Schools to conduct the local verification of the other six occupations. (KC)

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ED289982

A STUDY OF OCCUPATIONAL OPPORTUNITIES FOR CHICAGO'S YOUTH

DACUM TASK ANALYSIS AND SURVEY VERIFICATION

LOCALLY VERIFIED TASK LISTS

NATIONAL ALLIANCE OF BUSINESS
MIDWEST REGIONAL SERVICE OFFICE

Eleven East Adams, Suite 1008
Chicago, IL 60603

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Vincent J. Serritella

October 28, 1987

Mr. Peter Seidman
Program Improvement
Illinois State Board of Education
100 North First Street
Springfield, Illinois 62777

Dear Mr. Seidman:

The purpose of this letter is to transmit the new and verified task lists on ten occupations as required under our PY 1988 funding agreement NS-I-1-680, "A Study of Occupational Opportunities for Chicago's Youth. Per your request, 15 copies are enclosed.

You will find the DACUM task analysis and survey verification and the sample questionnaire on the following occupations:

1) Shipping and Receiving Clerk
2) General Office Clerk
3) Billing, Cost & Rate Clerk
4) Order Clerk

The four DACUM task lists were developed using the DACUM approach. DACUM panels consisted of between eight and twelve expert workers within an occupational area. These workers were identified based upon employers' interest and williness to participate in the survey. Each panel was conducted by a trainer facilitator and required a full day and one half. In addition to the standard DACUM agenda of analyzing duties and associated tasks, the identification of the frequency, importance, and learning difficulty of each task was included. The panel members were asked to identify job competencies such as knowledges, skills and abilities required to perform the job successfully as a basis for competency-based curriculum development. Approximately one week after the panel was conducted, each panelist was mailed a task analysis and survey verification form which consists of a list of Task Statements and Job Competencies identified during the task development process. Each

panelist was asked to rank the importance of each skill competency area on a 5 point scale. Additionaly, panelists were requested to add other skill/competency areas not included on the list. As a result we have identified not only the job tasks but also the skills, knowledge and abilities needed to perform those tasks. The enclosed DACUM panel analysis summarizes our findings.

The National Alliance of Business worked in cooperation with the Chicago Public Schools to conduct the local verification of the six following occupations:

1) Accounting Clerk
2) Typist/Word Processor
3) Drafter
4) Cook
5) Automobile Mechanic
6) Carpenter

Verification panels consisted of between 4 to 8 participants currently working in the occupation. Workers were identified based upon their interest and received a $100 honorarium for their service. The verification panel required one full day. Participants were required to verify task lists originally established by the State Board of Vocational Education.

Enclosed you will find both the original task lists and the locally validated task lists. Additionally, a list of the employability skills required to perform the above occupations is enclosed.

We hope our findings will be of assistance and as a result, the schools throughout Illinois will have the objective performance criteria needed for competency-based curriculum development.

Sincerely,

Vincent J. Serritella
Regional Vice President

VJS/EA/sb

Enclosures

NATIONAL ALLIANCE OF BUSINESS
DACUM TASK ANALYSIS AND SURVEY VERIFICATION
OCCUPATION: ORDER CLERK
JULY 22-23, 1987

DESCRIPTION: Order clerks process requests received from customers or company employees for products, services or materials. They may receive orders by mail, phone order forms, computer terminals, or directly from people. In some cases, they phone or write people to inform them of prices, shipping dates, delays or other information about their orders. They also may send orders to departments to be filled and follow-up orders to make sure of prompt delivery. Some help prepare written contracts for goods or handle service orders and complaints.

TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY A: PROCESS ORDERS			
TASKS: 1. Answer phone calls	4.9	5.0	1.9
2. Take/enter orders	4.9	5.0	3.5
3. Provide product information	4.1	4.9	3.4
4. Provide pricing information	4.5	5.0	3.3
5. Provide billing information	4.0	5.0	3.4
6. Provide delivery information	4.4	5.0	3.3
7. Arrange for installation/serivce	2.3	3.5	2.0
8. Finalize transactions	4.5	4.9	3.1
9. Record mail order payments (N/A)	2.2	2.7	1.8
DUTY B: PROVIDE CUSTOMER SERVICES			
TASKS: 1. Establish customer rapport	3.9	5.0	2.2
2. Handle complaints	4.0	4.5	3.7
3. Handle special accounts	3.4	3.5	3.7
4. Provide general information	3.3	4.4	2.6
5. Respond to customer correspondence	3.7	3.8	3.0
6. Update customer information	4.0	4.0	2.7
7. Issue refunds/credits	3.9	3.5	3.5
8. Authorize returns (N/A)	3.1	3.4	2.7
9. Process merchandise returns (N/A)	2.5	2.6	2.4
10. Adjust pricing	4.0	3.7	2.2
11. Suggest substitute merchandise	3.7	4.4	3.3
12. Provide additional sales options	3.0	3.5	2.9
13. Solicit credit applications	2.3	2.1	1.4
14. Process sample requests	2.4	3.1	2.0
15. Distribute printed information	2.5	2.7	1.0

TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY C: COMMUNICATE WITH OTHER DEPARTMENTS			
TASKS: 1. Forward complaint information	3.8	3.0	1.7
2. Forward payments	4.0	3.2	1.8
3. Forward lost business or new business information	3.0	1.7	1.5
4. Forward applications for credit approval	2.4	1.3	1.0
DUTY D: EXPEDITE ORDERS			
TASKS: 1. Contact vendors	3.8	3.7	2.8
2. Verify shipments (N/A)	4.3	3.4	3.0
3. Review backorder status	4.0	4.7	3.0
4. Provide special shipping (N/A)	4.4	4.6	2.6
5. Request proof of delivery (N/A)	3.5	2.6	2.3
DUTY E: CONTROL INVENTORY			
TASKS: 1. Receive merchandise	1.0	0.8	0.5
2. Insure proper storage and handling of merchandise	0.3	0.6	0.5
3. Locate merchandise	1.0	1.0	0.0
4. Rotate stock	0.0	0.0	0.0
5. Take inventory	1.0	0.8	0.3
6. Replenish display stock	0.0	0.0	0.0
7. Reorder stock	0.0	0.0	0.0
DUTY F: UPDATE PRODUCT INFORMATION			
TASKS: 1. Process requests for informational updates	0.7	1.3	0.3
2. Organize supply information	0.7	1.0	0.3
3. Conduct product surveys	0.0	0.3	0.3
4. Attend product seminars	1.3	1.0	0.7
DUTY G: MAINTAIN WORK ENVIRONMENT			
TASKS: 1. Set daily agenda	3.7	5.0	2.7
2. Maintain tickler file	3.0	4.3	2.3
3. Maintain display area	1.0	0.3	0.0
4. Organize office supplies	2.0	2.7	1.0
5. Maintain individual files	3.0	2.7	1.3
6. Attend customer service workshops	1.0	0.7	0.7
7. Provide on-the-job training	2.7	2.0	2.0

JOB COMPETENCIES	IMPORTANCE
KNOWLEDGE:	
1. Basic awareness of department operations	3.5
2. Knowledge of computer operations	2.3
3. Telephone etiquette	4.8
ATTITUDES/TRAITS:	
1. Dependability	4.8
2. Work independently	4.4
3. Punctual	4.4
4. Personable	4.0
5. Conscientious	4.3
6. Reliable	4.6
7. Hard worker	4.4
8. Team player	4.0
SKILLS:	
1. High school reading	4.9
2. Pleasant and understandable voice	4.6
3. Typing	2.5

DACUM PANELISTS:

Margie Baker
Peoples Gas, Light & Coke Co.

Gwendolyn Jones
The Reliable Corporation

Matthew Tapling
Walgreens Drug Store

Cheryl C. Everett
Sears, Roebuck & Co.

Fran McCormick
Baxter Travenol

Charlie Wade
The Reliable Corporation

SURVEY PARTICIPANTS:

Margie Baker
Peoples Gas, Light & Coke Co.

Gwendolyn Jones
The Reliable Corporation

Fran McCormick
Baxter Travenol

Matthew Tapling
Walgreens Drug Store

Cheryl C. Everett
Sears, Roebuck & Co.

Mary Kumpfer
Baxter Travenol

Ruby Reed
Baxter Travenol

Charlie Wade
The Reliable Corporation

NAME: _____

TITLE: _____

COMPANY: _____

INSTRUCTIONS FOR TASK ANALYSIS

The following pages detail the order clerk's job tasks that were identified by a group of order clerks. Because this job may differ slightly from company to company, or even between positions in the same company, we are asking your help in verifying that all tasks have been listed and properly described.

Specifically, we are asking you to:

1. Review the list of job duties and job tasks for an order clerk. Are all the tasks an order clerk performs listed? If not, add them under the appropriate duty area. Also check whether the tasks are described properly. If not, please suggest a better wording.

2. Rank each job task on its importance, frequency of performance, and difficulty on a scale of 0-5, with 5 representing the highest ranking. This information is critical to the development of training for order clerks.

3. In addition, please review and rank the importance of job competencies on a scale of 0-5, with 5 representing the highest ranking. Please make additions as you see fit.

If you have any questions on how to complete this form, please call Emily Alim or Ruth Kim at 341-9766. When you have completed the form, please return it in the enclosed stamped, self-addressed envelope.

ORDER CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Importance of Task						Frequency of Performance						Difficulty of Task					
DUTY A: PROCESS ORDERS	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Answer phone calls	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Take/enter orders	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Provide product information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Provide pricing information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Provide billing information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Provide delivery information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Arrange for installation/ service	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
8. Finalize transactions	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
9. Record mail order payments	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

ORDER CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements

DUTY B: PROVIDE CUSTOMER SERVICES	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not Important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Establish customer rapport	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Handle complaints	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Handle special accounts	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Provide general information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Respond to customer correspondence	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Update customer information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Issue refunds/credits	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
8. Authorize returns	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
9. Process merchandise returns	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
10. Adjust pricing	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
11. Suggest substitute merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
12. Provide additional sales options	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
(Continued next page)	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

ORDER CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements

	Importance of Task						Frequency of Performance						Difficulty of Task					
DUTY B: PROVIDE CUSTOMER SERVICES (cont.)	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not Important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
13. Solicit credit applications	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
14. Process sample requests	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
15. Distribute printed information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY C: COMMUNICATE WITH OTHER DEPARTMENTS																		
1. Forward complaint information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Forward payments	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Forward lost business or new business information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Forward applications for credit approval	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

ORDER CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not Important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY D: EXPEDITE ORDERS																		
1. Contact vendors	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Verify shipments	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Review backorder status	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Provide special shipping	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Request proof of delivery	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY E: CONTROL INVENTORY																		
1. Receive merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Insure proper storage and handling of merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Locate merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Rotate stock	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Take inventory	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Replenish display stock	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Reorder stock	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY F: UPDATE PRODUCT INFORMATION																		
1. Process requests for informational updates	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Organize supply information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Conduct product surveys	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Attend product seminars	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY G: MAINTAIN WORK ENVIRONMENT																		
1. Set daily agenda	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Maintain tickler file	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Maintain display area	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Organize office supplies	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Maintain individual files	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Attend customer service workshops	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Provide on-the-job training	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

ORDER CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
SKILLS:						
1. High school reading	5	4	3	2	1	0
2. Pleasant and understandable voice	5	4	3	2	1	0
3. Typing	5	4	3	2	1	0
	5	4	3	2	1	0
ATTITUDES/TRAITS:						
1. Dependability	5	4	3	2	1	0
2. Work independently	5	4	3	2	1	0
3. Punctual	5	4	3	2	1	0
4. Personable	5	4	3	2	1	0
5. Conscientious	5	4	3	2	1	0
6. Reliable	5	4	3	2	1	0
7. Hard worker	5	4	3	2	1	0
8. Team player	5	4	3	2	1	0

ORDER CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES KNOWLEDGE:	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
1. Basic awareness of operations of department	5	4	3	2	1	0
2. Knowledge of computer operations	5	4	3	2	1	0
3. Telephone etiquette	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
24	5	4	3	2	1	0

NATIONAL ALLIANCE OF BUSINESS
DACUM TASK ANALYSIS AND SURVEY VERIFICATION
OCCUPATION: BILLING, COST & RATE CLERKS
SEPTEMBER 1-2, 1987

DESCRIPTION: A billing, cost and rate clerk compiles data and computes fee and charges to prepare invoices for billing purposes; transcribes data from office records to obtain customer information and an itemized list of purchases and prices, discounts or credits given, and the total; provides billing information to customers; and assist in resolving billing discrepancies.

RELATED TITLES:

1. Account Technician
2. Client Accounting Coordinator - Production, Media
3. Customer Assistance - Billing Errors, Corrections
4. Service Representative

* Denotes advance tasks, not required for entry level employees.

	TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY A:	**PERFORM BILLING FUNCTIONS**			
TASKS:	1. Review billing schedule	3.8	4.2	4.6
	2. Access customer account	4.4	4.5	3.0
	3. Update customer information	4.4	4.1	3.0
	4. Review customer order for accuracy (problem solving)	3.3	2.2	2.5
	5. Determine product/service charges	3.9	3.5	3.6
	6. Determine appropriate taxes	3.5	3.0	3.3
	7. Determine overhead/other fees (N/A)	2.0	1.5	2.1
	8. Determine discounts	3.4	2.6	3.7
	9. Generate billing documents	4.8	4.0	4.3
	10. Assemble/distribute billing documents	3.1	2.8	2.2
	11. Report billing activity	4.3	2.5	2.3
	12. Reconcile accounts	3.7	3.3	3.5
	*13. Assist auditors	2.1	0.7	1.5
DUTY B:	**ESTABLISHING NEW BILLING FILES**			
TASKS:	1. Verify credit approval	1.8	0.9	1.9
	2. Assign customer number	3.7	2.7	3.1
	3. Input billing data	4.9	4.4	4.3
	4. Distribute "new customer" information	3.4	2.7	2.7

TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY C: RESOLVE BILLING PROBLEMS			
TASKS: 1. Research customer inquiry	4.6	4.4	4.1
2. Notify appropriate department	4.1	4.6	2.6
3. Verify problem resolution	4.1	4.4	3.8
4. Issue billing adjustments	4.6	4.2	4.5
5. Follow-up with customer	4.8	4.0	2.9
DUTY D: COMMUNICATE WITH CUSTOMERS			
TASKS: 1. Receive calls/inquiries	4.6	4.6	3.1
2. Provide billing information	4.6	4.5	3.4
3. Document inquiries	4.5	4.5	2.9
4. Respond to correspondence	4.6	4.5	3.1
5. Refer customer inquiries to appropriate department	4.2	4.8	2.1
DUTY E: COORDINATE DISTRIBUTION (PRODUCT OR SERVICE)			
TASKS: 1. Verify delivery (N/A)	2.3	1.3	2.0
2. Installation (N/A)	2.4	1.3	2.6
3. Determine distribution/shipping costs (N/A)	2.1	1.2	2.9
4. Determine installation costs (N/A)	2.5	1.5	2.7
5. Issue back order notification (N/A)	2.1	1.1	2.5
DUTY F: PROVIDE INTER-DEPARTMENTAL COMMUNICATIONS			
TASKS: 1. Answer questions from other departments	4.1	4.4	3.1
2. Provide status reports to management	3.5	2.4	2.5
3. Provide recommendations to management	2.9	2.7	1.7
DUTY G: PARTICIPATE IN CAREER DEVELOPMENT ACTIVITIES			
TASKS: 1. Maintain departmental standards	4.1	3.8	2.4
2. Participate in training programs	4.1	2.0	1.6
3. Attend informational meetings	3.9	2.5	0.6
4. Implement billing procedure changes	4.3	2.2	2.6
*5. Provide on-the-job training (as needed)	3.5	2.4	2.3

TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY H: MAINTAIN WORK AREA			
TASKS: 1. Organize daily work schedule	4.5	4.9	1.7
2. Maintain supply of company forms (N/A)	3.5	3.6	0.8
3. Organize office supplies (as needed & N/A)	2.8	3.8	0.8
4. Maintain working files	3.8	4.1	1.7
5. Ensure data security	4.7	4.9	1.7
6. Follow operational procedures for office equipment	4.1	4.4	1.2
7. Maintain time records	3.8	3.1	1.7

JOB COMPETENCIES	IMPORTANCE
KNOWLEDGE:	
1. English grammer	4.2
2. Corporate policies	4.0
3. Product/service	4.0
4. Pricing	4.0
ATTITUDES/TRAITS:	
1. Detail-oriented	3.8
2. Common sense	4.3
3. Congeniality	4.0
4. Cooperative	4.2
5. Dependable/reliable	4.6
6. Ability to worker under pressure	4.5
7. Good organization	4.5
SKILLS:	
1. Good arithmetic	3.4
2. Problem solving skills	4.4
3. Light typing (35 wpm)	2.5
4. Oral and written communication	4.1
5. Decision-making	4.3
6. Filing	3.0

EQUIPMENT USED:

1. Calculators
2. Computer terminals
3. Copiers
4. Microfiche readers
5. Fax/telecopier
6. Printers
7. Telephone systems
8. Typewriters

DACUM PANELISTS:

Romelle Burns
Xerox Corporation

Maryanne Ivy
Burrell Advertising, Inc.

Kim Levato
Anchor HMO

Edward S. Piatt
Central Management Services

Barbara Chilton
Xerox Corporation

Loriann Lee
J. Walter Thompson

Sunday C. Mollica
Illinois Bell

SURVEY PARTICIPANTS:

Mary Babler
Xerox Corporation

Laura Beaver
Xerox Corporation

Romelle Burns
Xerox Corporation

Darlene Czelcela
Xerox Corporation

Maryann Harkess
Xerox Corporation

Lindsey Bates
Xerox Corporation

Bruce Bloom
Xerox Corporation

Barbara Chilton
Xerox Corporation

Laurie Golden
Xerox Corporation

Rose Henin
Central Management Services

Maryanne Ivy
Burrell Advertising, Inc.

Sunday C. Mollica
Illinois Bell

Lyn Meyer
Xerox Corporation

Edward S. Piatt
Central Management Services

NAME: _____

TITLE: _____

COMPANY: _____

INSTRUCTIONS FOR TASK ANALYSIS

The following pages detail the order clerk's job tasks that were identified by a group of order clerks. Because this job may differ slightly from company to company, or even between positions in the same company, we are asking your help in verifying that all tasks have been listed and properly described.

Specifically, we are asking you to:

1. Review the list of job duties and job tasks for an order clerk. Are all the tasks an order clerk performs listed? If not, add them under the appropriate duty area. Also check whether the tasks are described properly. If not, please suggest a better wording.

2. Rank each job task on its importance, frequency of performance, and difficulty on a scale of 0-5, with 5 representing the highest ranking. This information is critical to the development of training for order clerks.

3. In addition, please review and rank the importance of job competencies on a scale of 0-5, with 5 representing the highest ranking. Please make additions as you see fit.

If you have any questions on how to complete this form, please call Emily Alim or Ruth Kim at 341-9766. When you have completed the form, please return it in the enclosed stamped, self-addressed envelope.

BILLING, COST & RATE CLERKS

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Importance of Task						Frequency of Performance						Difficulty of Task					
DUTY A: PERFORM BILLING FUNCTIONS	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not Important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Review billing schedule	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Access customer account	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Update customer account information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Review customer order for accuracy	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Determine product/service charges	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Determine appropriate taxes	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Determine overhead/other fees	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
8. Determine discounts	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
9. Generate billing documents	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
10. Assemble/distribute billing documents	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
11. Report billing activity	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
12. Reconcile accounts	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
13. Assist auditors	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not Important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY B: ESTABLISH NEW BILLING FILES																		
1. Verify credit approval	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Assign customer number	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Input billing data	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Distribute "new customer" information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY C: RESOLVE BILLING PROBLEMS																		
1. Research customer inquiry	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Notify appropriate departments	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Verify problem resolution	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Issue billing adjustments	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Follow-up with customer	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not Important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY D: COMMUNICATE WITH CUSTOMERS																		
1. Receive calls/inquiries	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Provide billing information	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Document inquiries requiring follow-up	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Respond to correspondence	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Refer customer inquiries to appropriate department	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY E: COORDINATE DISTRIBUTION (OF PRODUCT OR SERVICE) FUNCTIONS																		
1. Verify delivery	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Installation	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Determine distribution/ shipping costs	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Determine installation costs	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Issue back order notification	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

BILLING, COST & RATE CLERKS

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

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How difficult is this task to learn to perform correctly?

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Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY F: PROVIDE INTER-DEPARTMENTAL COMMUNICATIONS																		
1. Answer questions from other departments	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Provide status reports to management	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Provide recommendations to management	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY G: PARTICIPATE IN CAREER DEVELOPMENT ACTIVITIES																		
1. Maintain departmental standards	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Participate in training programs	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Attend informational meetings	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Implement billing procedure changes	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Provide on-the-job training	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

BILLING, COST & RATE CLERKS

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Importance of Task						Frequency of Performance						Difficulty of Task					
DUTY H: MAINTAIN WORK AREA	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Organize daily work schedule	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Maintain supply of company forms	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Organize office supplies	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Maintain working files	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Ensure data security	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Follow operational procedures for office equipment	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Maintain time records	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
SKILLS:						
1. Good arithmetic	5	4	3	2	1	0
2. Problem solving skills	5	4	3	2	1	0
3. Light typing (35 wpm)	5	4	3	2	1	0
4. Oral and written communication	5	4	3	2	1	0
5. Decision-making	5	4	3	2	1	0
6. Filing	5	4	3	2	1	0
KNOWLEDGE:						
1. English grammar	5	4	3	2	1	0
2. Corporate policies	5	4	3	2	1	0
3. Product/service	5	4	3	2	1	0
4. Pricing	5	4	3	2	1	0
	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES ATTITUDES/TRAITS:	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
1. Detail-oriented	5	4	3	2	1	0
2. Common-sense	5	4	3	2	1	0
3. Congeniality	5	4	3	2	1	0
4. Cooperative	5	4	3	2	1	0
5. Dependable/reliable	5	4	3	2	1	0
6. Ability to work under pressure	5	4	3	2	1	0
7. Good organization	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0

NATIONAL ALLIANCE OF BUSINESS
DACUM TASK ANALYSIS AND SURVEY VERIFICATION
OCCUPATION: GENERAL OFFICE CLERK
SEPTEMBER 9-10, 1987

DESCRIPTION: Performs secretarial activities in an office environment. Produces any combination of the following and similiar clerical tasks requiring limited knowledge of systems or procedures: writes or types bills, statements, receipts, checks, or other documents; copying information from one record to another; proofreads records or forms; counts, weighs or measures materials; sorts and files records; receives money from customers and deposits money in bank; addresses envelops or packages by hand or with envelop stuffing machine; answers telephone, conveys messages, and runs errands; stamps, sorts, and distributes mail; stamps or numbers forms by hand or machine and copies documents using office duplicating equipment.

RELATED TITLES:

1. Senior Clerk
2. Senior Clerk-Typist
3. Requisition Clerk
4. Processor
5. Control Clerk
6. Accounting Clerk
7. Inquiry Clerk
8. Payroll Clerk

TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY A: ANSWER TELEPHONE			
TASKS: 1. Demonstrate proper telephone etiquette	4.2	4.9	2.5
2. Direct calls	3.8	4.6	2.3
3. Screen calls	3.2	4.1	2.0
4. Take messages	4.4	4.9	2.2
DUTY B: OPERATE OFFICE MACHINES			
TASKS: 1. Operate electronic typewriter	4.2	4.6	4.0
2. Perform basic computer operations	3.0	2.8	3.8
3. Operate 10-key adding machine or calculator	2.9	2.7	3.1
4. Operate photocopier	3.8	4.6	1.8
DUTY C: GREET INDIVIDUALS			
TASKS: 1. Create a congenial atmosphere	4.1	4.1	1.7
2. Identify purpose of visit	3.6	3.8	1.7
3. Provide information needed	3.9	4.3	2.3
4. Notify appropriate individual	3.9	3.8	1.8

TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY D: HANDLE IN-COMING AND OUT-GOING MAIL			
TASKS: 1. Sort and distribute mail	3.2	4.1	2.2
2. Log mail	2.2	2.4	1.5
3. Direct unidentified mail	2.9	3.4	1.7
4. Identify method of mailing	2.6	3.2	1.4
5. Process out-going mail	3.5	4.1	1.6
DUTY E: MAINTAIN FILES			
TASKS: 1. Identify the filing system	4.6	4.2	3.0
2. Make file folders	3.8	2.4	2.0
3. Sort documents	4.0	4.2	2.3
4. Retrieve files	4.0	3.9	2.2
5. Purge the files	3.4	1.3	2.1
DUTY F: ADDRESS COMPLAINTS			
TASKS: 1. Prioritize the complaints	3.6	3.8	2.5
2. Handle the complaint, if possible	3.6	3.8	2.4
3. Direct complaint to appropriate unit/person	4.1	4.3	2.2
DUTY G: MAINTAIN FINANCIAL ACCOUNTS			
TASKS: 1. Prepare vouchers/invoices and billing statements	2.9	2.2	2.2
2. Prepare checks or check requisitions	2.5	1.7	2.3
3. Maintain petty cash	2.2	1.6	1.7

JOB COMPETENCIES	IMPORTANCE
KNOWLEDGE:	
1. Knowing company policy and procedures	4.4
2. Familiarity with computer/word processor operations	3.7
3. Completion of application forms	3.8
4. Knowledge of mailing methods	3.3
5. Knowledge of debits and credits	2.6
6. Knowledge of six basic telephone systems	2.9
ATTITUDES/TRAITS:	
1. Pleasant personality	4.6
2. Asking questions	4.3
3. Patience	4.6
4. Honesty	4.6
5. Willing to accept extra responsibility	4.3
6. Initiative	4.0
7. Able to develop a good rapport	4.2
8. Maintain confidentiality	4.2
9. Dependability	4.4
10. Consideration	4.1
11. Judgement decisions	4.1
12. Team player	3.9
13. Flexibility with time schedule	3.5
14. Good listening skills	4.2
15. Problem-solving	4.4
16. Interpersonal skills	4.3

JOB COMPETENCIES	IMPORTANCE
SKILLS:	
1. (Composition)	5.0
2. Oral communication	4.6
3. Good standard English skills (written and oral)	4.9
4. Telephone manners	4.6
5. Telephone operation	3.8
6. (Dictation)	5.0
7. (Editing material)	5.0
8. Follow directions (written and oral)	4.9
9. Thorough (attention to detail)	4.9
10. Organize workspace	3.5
11. Operate 10-key adding machine by touch	2.2
12. Organizational skills	4.3
13. Type 40-50 wpm net	3.9
14. Familiar with photocopier operations	3.6
15. Basic general business math	3.7
- checks	2.4
- maintain ledger	2.2
- budgets/tax forms	2.0
- balancing	2.6
16. Basic math calculations	4.1
- addition	4.2
- subtraction	4.2
- multiplication	4.1
- division	3.9
- fractions	3.5
- percentages	3.6
- decimals	3.3
17. Time management	3.6
18. Attendance (0 in the first 6 months, 2 episodes per year and punctuality 5 minutes early, 2 times for non-extraordinary)	3.7
19. Able to file:	4.6
- alphabetically	4.6
- numerically	4.0
- chronologically	3.9
20. Meet company dress code	4.1

DACUM PANELISTS:

Karen Bell
Carson Pirie Scott & Company

Carol Embry
Mount Sinai Hospital

Joanne Jackson
Chicago Marriott Hotel

Gail Jamison
Chemical Card Corp.

Linda Lovejoy
Continental Bank

Laura Mileusnich
USG Corporation

Senti Ratcliff
Metropolitan Sanitary District

Janet Rapp
Central Management Services

Dorace Steppes
First National Bank of Chicago

Bridget Swider
Citicorp Savings of Illinois

SURVEY PARTICIPANTS:

Jeanette Cozzi
Chicago Marriott Hotel

Carolyn Day
Metropolitan Sanitary District

Carol Embry
Mount Sinai Hospital

Gail Jamison
Chemical Card Corp.

Velma Jenning
Chicago Marriott O'Hare

Joanne Jackson
Chicago Marriot Corporation

D. Kolcz
USG Corporation

Kathleen Kozak
Central Management Services

Laura Mileusnich
USG Corporation

Nancy L. Monte
Chemical Card Corporation

Daisy A. Parayno
USG Corporation

Celestine Patterson
Mount Sinai Hospital

Janet Rapp
Central Management Services

Senti Ratcliff
Metropolitan Sanitary District

Dominic Smith
Metropolitan Sanitary District

Olga Swiguez
Central Management Services

Dorace Steppes
First National Bank of Chicago

Edgar Tilley
Central Management Services

Ethel Weston
Central Management Services

NAME: _____

TITLE: _____

COMPANY: _____

INSTRUCTIONS FOR TASK ANALYSIS

The following pages detail the order clerk's job tasks that were identified by a group of order clerks. Because this job may differ slightly from company to company, or even between positions in the same company, we are asking your help in verifying that all tasks have been listed and properly described.

Specifically, we are asking you to:

1. Review the list of job duties and job tasks for an order clerk. Are all the tasks an order clerk performs listed? If not, add them under the appropriate duty area. Also check whether the tasks are described properly. If not, please suggest a better wording.

2. Rank each job task on its importance, frequency of performance, and difficulty on a scale of 0-5, with 5 representing the highest ranking. This information is critical to the development of training for order clerks.

3. In addition, please review and rank the importance of job competencies on a scale of 0-5, with 5 representing the highest ranking. Please make additions as you see fit.

If you have any questions on how to complete this form, please call Emily Alim or Ruth Kim at 341-9766. When you have completed the form, please return it in the enclosed stamped, self-addressed envelope.

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY A: ANSWER TELEPHONES																		
1. Demonstrate proper telephone etiquette	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Direct calls	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Screen calls	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Take messages	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY B: OPERATE OFFICE MACHINES																		
1. Operate electronic typewriter	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Perform basic computer operations	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Operate 10-key adding machine or calculator	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Operate photocopier	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY C: GREET INDIVIDUALS																		
1. Create a congenial atmosphere	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Identify purpose of visit	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Provide information needed	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Notify appropriate individual	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY D: HAND IN-COMING AND OUT-GOING MAIL																		
1. Sort/distribute mail	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Log mail	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Direct unidentified mail	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Identify method of mailing	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Process out-going mail	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	[illegible]	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY E: MAINTAIN FILES																		
1. Identify the filing system	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Make file folders	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Sort documents	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Retrieve files	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Purge the files	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY F: ADDRESS COMPLAINTS																		
1. Prioritize the complaint	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Handle the complaint (if possible)	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Direct complaint to appropriate unit/person	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Importance of Task						Frequency of Performance						Difficulty of Task					
DUTY G: MAINTAIN FINANCIAL ACCOUNTS	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Prepare vouchers/invoices and billing statements	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Prepare checks or check requisitions	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Maintain petty cash	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

ORDER CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Importance of Task						Frequency of Performance						Difficulty of Task					
DUTY D: EXPEDITE ORDERS	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Contact vendors	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Verify shipments	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Review backorder status	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Provide special shipping	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Request proof of delivery	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

ORDER CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements

DUTY 3: CONTROL INVENTORY

	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Receive merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Insure proper storage and handling of merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Locate merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Rotate stock	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Take inventory	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Replenish display stock	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Reorder stock	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
KNOWLEDGE:						
1. Knowing company policy and procedures	5	4	3	2	1	0
2. Familarity with computer, word processor operations	5	4	3	2	1	0
3. Completion of application forms	5	4	3	2	1	0
4. Knowledge of mailing methods	5	4	3	2	1	0
5. Knowledge of debits and credits	5	4	3	2	1	0
6. Knowledge of six basic telephone systems	5	4	3	2	1	0
SKILLS:						
1. Oral communication	5	4	3	2	1	0
2. Good standard English skills (written and oral)	5	4	3	2	1	0
3. Telephone manners	5	4	3	2	1	0
4. Telephone operation	5	4	3	2	1	0
(continued next page)						

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES SKILLS: (cont.)	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not Important
5. Follow directions (written and oral)	5	4	3	2	1	0
6. Thorough - (attention to detail)	5	4	3	2	1	0
7. Organize work-space	5	4	3	2	1	0
8. Operate 10-key adding machine by touch	5	4	3	2	1	0
9. Organizational skills	5	4	3	2	1	0
10. Type 40-50 WPM net	5	4	3	2	1	0
11. Familiar with photocopier operations	5	4	3	2	1	0
12. Basic general business math	5	4	3	2	1	0
- checks	5	4	3	2	1	0
- maintain ledger	5	4	3	2	1	0
- budgets/tax forms	5	4	3	2	1	0
- balancing	5	4	3	2	1	0
(continued next page)						

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
SKILLS: (cont.)						
13. Basic math calculations	5	4	3	2	1	0
- addition	5	4	3	2	1	0
- subtraction	5	4	3	2	1	0
- multiplication	5	4	3	2	1	0
- division	5	4	3	2	1	0
- fractions	5	4	3	2	1	0
- percentages	5	4	3	2	1	0
- decimals	5	4	3	2	1	0
14. Time management	5	4	3	2	1	0
15. Attendance (0 in the first 6 months, 2 episodes/year and Punctuality (5 minutes early, 2 times for non-extraordinary)	5	4	3	2	1	0
	5	4	3	2	1	0

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
SKILLS: (cont.)						
16. Able to file:	5	4	3	2	1	0
- alphabetically	5	4	3	2	1	0
- numberically	5	4	3	2	1	0
- chronologically	5	4	3	2	1	0
17. Meet company dress code	5	4	3	2	1	0
	5	4	3	2	1	0
ATTITUDES/TRAITS:						
1. Pleasant personality	5	4	3	2	1	0
2. Asking questions	5	4	3	2	1	0
3. Patience	5	4	3	2	1	0
4. Honesty	5	4	3	2	1	0
5. Willing to accept extra responsibility	5	4	3	2	1	0
(continuted next page)	5	4	3	2	1	0

GENERAL OFFICE CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES ATTITUDES/TRAITS: (cont.)	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not Important
6. Initiative	5	4	3	2	1	0
7. Able to develop a good rapport	5	4	3	2	1	0
8. Maintain confidentiality	5	4	3	2	1	0
9. Dependability	5	4	3	2	1	0
10. Consideration	5	4	3	2	1	0
11. Judgement decisions	5	4	3	2	1	0
12. Team player	5	4	3	2	1	0
13. Flexibility with time schedule	5	4	3	2	1	0
14. Good listening skills	5	4	3	2	1	0
15. Problem - solving	5	4	3	2	1	0
16. Interpersonal skills	5	4	3	2	1	0
	5	4	3	2	1	0
	5	4	3	2	1	0

NATIONAL ALLIANCE OF BUSINESS
DACUM TASK ANALYSIS AND SURVEY VERIFICATION
OCCUPATION: SHIPPING AND RECEIVING CLERK
SEPTEMBER 15-16, 1987

DESCRIPTION: Shipping and receiving clerks keep records and prepare merchandise for storage or shipment. Shipping clerks pack, weigh, label and dispatch articles, ensuring that shipments comply with purchase orders. They determine shipment methods and may also direct loading of items to be shipped. Receiving clerks, in addition to keeping records, may unpack items and route them to final destinations in the plant or warehouse.

RELATED TITLES:
1. Materials Handling Processor
2. Merchandise Expeditor
3. Stock Handler

* Denotes advance tasks, not required for entry level employees.

TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY A: RECEIVE MERCHANDISE			
TASKS: 1. Verify delivery receipts	4.8	5.0	2.5
2. Inspect condition/quantity of delivered goods	5.0	5.0	2.8
3. Accept or refuse delivery	4.7	5.0	3.3
4. Unload merchandise	4.8	5.0	2.5
5. Check purchase order	4.7	5.0	3.4
6. Record receipt of shipment	4.7	5.0	3.4
DUTY B: MAINTAINING RECORDS			
TASKS: 1. File shipping and receiving documents	4.3	4.5	2.8
2. Price merchandise	1.8	1.5	1.4
3. Apply sensor tags when needed	0.6	0.8	1.2
4. Apply inventory tags	3.0	3.6	2.5
*5. Assist management with audits	3.6	1.7	2.6
DUTY C: INTERNAL DISTRIBUTION OF MERCHANDISE			
TASKS: 1. Separate goods for routing	4.2	5.0	2.5
2. Generate move ticket	4.2	4.8	2.8
3. Deliver merchandise	4.2	5.0	2.6
4. Deliver mail	3.3	4.2	2.0

TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY D: INTERNAL RECEIVING OF MERCHANDISE			
TASKS: 1. Receive/process merchandise from departments for returns	4.2	4.5	2.8
2. Receive/process merchandise/items for storage	4.6	4.3	3.2
3. Receive/process merchandise/items for repair	2.2	2.3	2.0
4. Receive/process items for disposal	4.0	4.2	2.2
DUTY E: SHIPPING MERCHANDISE			
TASKS: 1. Verify shipping merchandise	5.0	5.0	3.7
2. Pack merchandise	4.6	5.0	3.0
3. Weigh merchandise	2.8	2.6	2.2
4. Determine value	3.6	3.3	2.3
5. Determine most economical way to ship	3.3	1.8	2.2
6. Calculate charges	2.5	1.6	1.4
7. Attach shipping label	4.2	4.6	2.7
8. Contact transportation agent	3.6	4.3	2.3
9. Complete shipping records	4.6	4.8	3.0
DUTY F: INVENTORY CONTROL			
TASKS: 1. Rotate stock	3.3	3.7	2.6
2. Notify purchasing of low stock situations	4.5	3.8	2.4
3. Conduct inventory of storage area	2.8	3.2	2.4
4. Notify management of location changes	3.3	3.5	3.4
DUTY G: SPECIAL HANDLING			
TASKS: 1. Identify special handling needs	4.5	4.5	2.8
2. Utilize special packing procedures	4.5	4.5	3.0
3. Utilize special labeling procedures	4.5	4.5	3.0
4. Utilize special storage procedures	4.7	4.3	2.8
5. Utilize special shipping procedures	4.7	4.3	3.0
6. Utilize special security procedures	4.5	4.7	2.7

TASK STATEMENTS	IMPORTANCE OF TASK	FREQUENCY OF TASK	DIFFICULTY OF TASK
DUTY H: COMMUNICATIONS			
TASKS: 1. Process incoming calls	4.5	5.0	3.7
2. Handle complaints	4.7	4.5	3.5
3. Practice telephone etiquette	5.0	5.0	3.3
4. Provide delivery instructions to truck drivers	3.5	4.5	2.5
5. Notify department of goods received	4.3	4.2	2.5
6. Notify supervisor of damaged goods	4.5	4.5	3.3
DUTY I: TRAINING AND DEVELOPMENT			
TASKS: 1. Attend training programs	3.5	1.2	1.8
2. Practice company policies	5.0	5.0	2.7
3. Provide on-the-job training	4.5	3.5	2.8
4. Conduct specialized training	3.7	2.5	3.0
5. Provide recommendations to management	4.3	2.7	1.5
DUTY J: MAINTAINING WORK AREA			
TASKS: 1. Perform routine maintenance	4.5	4.7	2.5
2. Observe company safety rules	5.0	5.0	2.9
3. Notify supervisor of equipment failure	4.8	4.2	2.3

JOB COMPETENCIES	IMPORTANCE
KNOWLEDGE:	
1. Basic computer operation	4.7
2. Basic warehousing	4.2
3. Materials handling equipment operations	4.2

JOB COMPETENCIES	IMPORTANCE
ATTITUDES/TRAITS:	
1. Integrity	5.0
2. Good physical condition	4.3
3. Common sense	5.0
4. Presentable appearance	4.0
5. Dependability	5.0
6. Flexibility	4.5
7. Punctuality	4.8
8. Ability to interact with co-workers	4.0
9. Work independently	4.8
SKILLS:	
1. High school reading skills	5.0
2. Basic arithmetic skills	5.0
3. Legible handwriting	4.8
4. Oral and written communication skills	4.8
SAFETY:	
1. Proper dress	4.5
2. Special protective wear	4.2
3. Equipment operation precautions	4.7

DACUM PANELISTS:

Lawrence Dillion
Central Management Services

Daniel Freitag
Chicago City-Wide Colleges

Robert Wolak
R.R. Donnelley & Sons

Patricia Dunczyk
Montgomery Wards

Allen Triplett
First National Bank of Chicago

SURVEY PARTICIPANTS:

Clarence Banks
R.R. Donnelley & Sons

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Chicago City-Wide Colleges

Allen Triplett
First National Bank of Chicago

Al Eisman
First National Bank of Chicago

Frank Mola
First National Bank of Chicago

Robert Wolak
R.R. Donnelley & Sons

NAME: _____

TITLE: _____

COMPANY: _____

INSTRUCTIONS FOR TASK ANALYSIS

The following pages detail the order clerk's job tasks that were identified by a group of order clerks. Because this job may differ slightly from company to company, or even between positions in the same company, we are asking your help in verifying that all tasks have been listed and properly described.

Specifically, we are asking you to:

1. Review the list of job duties and job tasks for an order clerk. Are all the tasks an order clerk performs listed? If not, add them under the appropriate duty area. Also check whether the tasks are described properly. If not, please suggest a better wording.

2. Rank each job task on its importance, frequency of performance, and difficulty on a scale of 0-5, with 5 representing the highest ranking. This information is critical to the development of training for order clerks.

3. In addition, please review and rank the importance of job competencies on a scale of 0-5, with 5 representing the highest ranking. Please make additions as you see fit.

If you have any questions on how to complete this form, please call Emily Alim or Ruth Kim at 341-9766. When you have completed the form, please return it in the enclosed stamped, self-addressed envelope.

SHIPPING & RECEIVING CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Importance of Task						Frequency of Performance						Difficulty of Task					
DUTY A: RECEIVING MERCHANDISE	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not Important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Verify delivery receipts	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Inspect condition/quantity of delivered goods	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Accept or refuse delivery	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Unload merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Check purchase order	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Record receipt of shipment	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY B: MAINTAINING RECORDS																		
1. File shipping/receiving documents	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Price merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Apply sensor tags when needed	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Apply inventory tags	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Assist management with audits	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

SHIPPING & RECEIVING CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY C: INTERNAL DISTRIBUTION OF MERCHANDISE																		
1. Separate goods for routing	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Generate move ticket	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Deliver merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Deliver mail	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY D: INTERNAL RECEIVING OF MERCHANDISE																		
1. Receive/process merchandise from depts. for returns	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Receive/process merchandise/ other items for storage	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Receive/process merchandise/ items for repair	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Receive/process items for disposal	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

SHIPPING & RECEIVING CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not Important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY E: SHIPPING MERCHANDISE																		
1. Verify shipping merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Pack merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Weigh merchandise	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Determine value	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Determine most economical way to ship	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Calculate charges	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
7. Attach shipping label	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
8. Contact transportation agent	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
9. Complete shipping records	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

SHIPPING & RECEIVING CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY F: INVENTORY CONTROL																		
1. Rotate stock	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Notify purchasing of low stock situations	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Conduct inventory of storage area	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Notify management of location changes	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY G: SPECIAL HANDLING																		
1. Identify special handling needs	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Utilize special packing procedures	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Utilize special labeling procedures	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Utilize special storage procedures	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Utilize special shipping procedures	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Utilize special security procedures	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

SHIPPING & RECEIVING CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not Important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
DUTY H: COMMUNICATIONS																		
1. Process incoming calls	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Handle complaints	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Practice telephone etiquette	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Provide delivery instructions to truck drivers	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Notify department of goods received	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
6. Notify supervisor of damaged goods	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
DUTY I: TRAINING AND DEVELOPMENT																		
1. Attend training programs	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Practice company policies	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Provide on-the-job training	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
4. Conduct specialized training	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
5. Provide recommendations to management	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

SHIPPING & RECEIVING CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

Frequency of Performance
How frequently do you perform this task?

(Circle one response)

Difficulty of Task
How difficult is this task to learn to perform correctly?

(Circle one response)

Task Statements DUTY J: MAINTAINING WORK AREA	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not Important	Daily	Several times per week	Weekly	Monthly	Quarterly	Not performed	Intensive classroom training needed	Classroom training needed	Significant on-the-job training required	Minimal on-the-job training required	Demonstration of task needed	Not difficult
1. Perform routine maintenance	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
2. Observe company safety rules	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
3. Notify supervisor of equipment failure	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0
	5	4	3	2	1	0	5	4	3	2	1	0	5	4	3	2	1	0

SHIPPING AND RECEIVING CLERK

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
KNOWLEDGE:						
1. Basic computer operation	5	4	3	2	1	0
2. Basic warehousing	5	4	3	2	1	0
3. Materials handling equipment operations	5	4	3	2	1	0
	5	4	3	2	1	0
ATTITUDES/TRAITS:						
1. Integrity	5	4	3	2	1	0
2. Good physical condition	5	4	3	2	1	0
3. Common sense	5	4	3	2	1	0
4. Presentable appearance	5	4	3	2	1	0
5. Dependability	5	4	3	2	1	0
6. Flexibility	5	4	3	2	1	0
7. Punctuality	5	4	3	2	1	0
(continued next page)	5	4	3	2	1	0

NOTE: PLEASE BE SURE YOU HAVE READ THE ABOVE INSTRUCTIONS CAREFULLY BEFORE PROCEEDING.

Importance of Task
How important is the performance of this task in your job as _____

(Circle one response)

JOB COMPETENCIES	Essential	Very important	Important not critical	Somewhat important	Minor importance	Not important
ATTITUDES/TRAITS: (cont.)						
8. Ability to interact with co-workers	5	4	3	2	1	0
9. Work independently	5	4	3	2	1	0
	5	4	3	2	1	0
SKILLS:						
1. High school reading skills	5	4	3	2	1	0
2. Basic arithmetic skills	5	4	3	2	1	0
3. Legible handwriting	5	4	3	2	1	0
4. Oral and written communication skills	5	4	3	2	1	0
	5	4	3	2	1	0
SAFETY:						
1. Proper dress	5	4	3	2	1	0
2. Special protective wear	5	4	3	2	1	0
3. Equipment operation precautions	5	4	3	2	1	0

LOCALLY VALIDATED TASK LIST
A COOPERATIVE EFFORT BETWEEN
THE NATIONAL ALLIANCE OF BUSINESS AND
THE CHICAGO PUBLIC SCHOOLS
SEPTEMBER 10, 1987

ACCOUNTING CLERK

(All references to manual procedures can be performed electronically)
(* Denotes entry level skills)

DUTY A: Recording Entries in Journals and Ledgers

TASKS:
*1. Record accounting entries for buying merchandise on account using manual bookkeeping system
*2. Record accounting entries for cash payments using manual bookkeeping system
*3. Record accounting entries for selling merchandise on account using manual bookkeeping system
*4. Record cash receipts accounting entries using manual bookkeeping system
*5. Post from cash journals using manual bookkeeping system
*6. Record sales tax accounting entries using manual bookkeeping system
7. Record accounting entries using peg board
*8. Record accounting entries in a combination journal using manual bookkeeping system
*9. Record accounting entries pertaining to notes and interest using manual bookkeeping system
*10. Record accounting entries pertaining to accrued interest income using manual bookkeeping system
*11. Record accounting entries pertaining to accrued interest expense using manual bookkeeping system
*12. Record accounting entries pertaining to payroll using manual bookkeeping system
*13. Record payroll tax accounting entries using manual bookkeeping system
14. Record accounting entries pertaining to corporation income taxes using manual bookkeeping system
*15. Record accounting entries to adjust an account using a manual bookkeeping system
*16. Post directly to ledger from source document using manual bookkeeping system
*17. Post to ledger account from journals using manual bookkeeping system
*18. Correct errors indicated by trial balance
*19. Write receipts for checks and cash sales

DUTY B: Accomplishing Periodic Accounting/Reporting Activities

TASKS:
1. Record opening entries for new business using manual bookkeeping system
*2. Foot, prove and rule journals
*3. Record closing journal entries using manual bookkeeping system
*4. Prepare customer's statement of accounts
*5. Prepare invoices for payments due
6. Record and verify inventory
*7. Type periodic reports and statements
*8. Prepare checks to pay bills for business
9. Prepare post-closing trial balance using a calculator
10. Prepare income statement using calculator
11. Prepare capital statements using a calculator
12. Prepare balance sheet using a calculator
13. Prepare schedule of accounts payable using calculator
14. Prepare schedule of accounts receivable using calculator
15. Prepare schedule of cost of goods sold using calculator
*16. Analyze and verify ledger accounts

DUTY C: Accomplishing General Accounting/Banking Related Activities

TASKS:
1. Process accounts payable invoices in manual bookkeeping system
2. Record discounts allowable on invoices
3. Record daily sales on unit control forms
4. Prepare credit memos for goods returned
5. Reconcile statements using calculator
6. Process returned checks
7. Fill out purchase orders
8. Prepare invoices
9. Prepare accounting data for computer processing
10. Prepare reconciliation correction sheets for changes to computer generated reports

DUTY D: Accomplishing Payroll Activities

TASKS:
*1. Prepare payroll using manual payroll system
*2. Process salary adjustments manually
*3. Prepare individual employee's earnings record manually
4. Prepare commission statements manually
*5. Prepare payroll statements manually
6. Prepare employee's form W-2 manually

7. Prepare employer's quarterly federal tax returns manually (form 941)
8. Prepare federal tax deposits
9. Prepare employer's quarterly state tax returns manually
10. Prepare state tax deposits
11. Prepare employer's annual reconciliation reports of income tax withheld manually (form W-3)
12. Prepare employer's federal unemployment tax report manually (form 940)
13. Prepare state unemployment tax report manually
14. Prepare FICA tax reports manually
*15. Post payroll deductions using manual bookkeeping system

DUTY E: Maintaining Office Equipment

TASKS:
*1. Replace paper and ribbons on office machines
*2. Clean equipment
*3. Perform maintenance functions on photocopier such as changing toner and replacing paper
*4. Change paper tapes on calculators or adding machines
*5. Repair minor office equipment malfunctions
*6. Recommend service on equipment

DUTY F: Performing Clerical Activities

TASKS:
1. Duplicate materials using photocopying machine
2. Process outgoing mail
3. Process incoming mail
*4. Set up new files
*5. File materials using alphabetic filing system
*6. File materials using numeric filing system
*7. File materials using subject filing system
*8. Verify calculations on source document using calculator
*9. Process incoming telephone calls
*10. Process outgoing telephone calls
11. Clean and straighten up work area
12. Equip work station with office supplies and office forms
13. Record outgoing long distance telephone calls
*14. Prioritize work

The following are incumbent workers who were involved in a consultant capacity to locally verify this task list.

Lucy Jones
Electro-Motive Div./G.M.

Gina Loiacono
FMC Corporation

Theresa McWilliams
Chicago City Wide College

Genita Robinson
Penny's Real Estate

Loretta Thomas
Beverly Bank

Vernon Woods

ACCOUNTING CLERK

DUTY A: Recording Entries in Journals and Ledgers

TASKS:
1 Record accounting entries for buying merchandise on account using manual bookkeeping system
2 Record accounting entries for cash payments using manual bookkeeping system
3 Record accounting entries for selling merchandise on account using manual bookkeeping system
4 Record cash receipts accounting entries using manual bookkeeping system
5 Post from cash journals using manual bookkeeping system
6 Record sales tax accounting entries using manual bookkeeping system
7 Record accounting entries using peg board
8 Record accounting entries in a combination journal using manual bookkeeping system
9 Record accounting entries pertaining to notes and interest using manual bookkeeping system
10 Record accounting entries pertaining to accrued interest income using manual bookkeeping system
11 Record accounting entries pertaining to accrued interest expense using manual bookkeeping system
12 Record accounting entries pertaining to payroll using manual bookkeeping system
13 Record payroll tax accounting entries using manual bookkeeping system
14 Record accounting entries pertaining to corporation income tax using manual bookkeeping system
15 Record accounting entries to adjust an account using a manual bookkeeping system
16 Post directly to ledger from source document using manual bookkeeping system
17 Post to ledger account from journals using manual bookkeeping system
18 Correct errors indicated by trial balance
19 Write receipts for checks and cash sales

DUTY B: Accomplishing Periodic Accounting/Reporting Activities

TASKS:
1 Record opening entries for new business using manual bookkeeping system
2 Foot, prove and rule cash journals
3 Record closing journal entries using manual bookkeeping system
4 Prepare customer's statement of accounts
5 Prepare invoices for payments due
6 Take inventory
7 Type periodic reports and statements
8 Write checks to pay bills for business
9 Prepare post-closing trial balance using a calculator
10 Prepare income statement using calculator
11 Prepare capital statements using calculator
12 Prepare balance sheet using calculator
13 Prepare schedule of accounts payable using calculator
14 Prepare schedule of accounts receivable using calculator

15 Prepare schedule of cost of goods sold using calculator

DUTY C: Accomplishing General Accounting/Banking Related Activities

TASKS:
1 Process accounts payable invoices in manual bookkeeping system
2 Record discounts allowable on invoices
3 Record daily sales on unit control forms
4 Prepare credit memos for goods returned
5 Reconcile bank statements using calculator
6 Process returned checks
7 Fill out purchase order invoices
8 Prepare bill of sale
9 Prepare accounting data for computer processing
10 Prepare reconciliation correction sheets for changes to computer generated reports

DUTY D: Accomplishing Payroll Activities

TASKS:
1 Post payroll deductions using manual bookkeeping system
2 Prepare individual employee's earnings record manually
3 Prepare salesperson's commission statements manually
4 Process salary adjustments manually

DUTY E: Maintaining Office Equipment

TASKS:
1 Change office equipment ribbons
2 Clean equipment
3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Change paper tapes on calculators or adding machines
5 Repair minor office equipment malfunctions
6 Recommend service on equipment
7 Replace paper and ribbons on office machines

DUTY F: Performing Clerical Activities

TASKS:
1 Duplicate materials using photocopying machine
2 Process outgoing mail
3 Process incoming mail
4 Set up new files
5 File materials using alphabetic filing system
6 File materials using numeric filing system
7 File materials using subject filing system
8 Verify calculations on source documents using calculator
9 Process incoming telephone calls
10 Process outgoing telephone calls
11 Clean and straighten up work area
12 Equip work station with office supplies and office forms
13 Record outgoing long distance telephone calls
14 Prioritize work

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

LOCALLY VALIDATED TASK LIST
A COOPERATIVE EFFORT BETWEEN
THE NATIONAL ALLIANCE OF BUSINESS AND
THE CHICAGO PUBLIC SCHOOLS
SEPTEMBER 21, 1987

TYPIST/WORD PROCESSOR

(* Denotes entry level skills)

DUTY A: Typewriting/Inputting

TASKS:
*1 Type/key from longhand or edited rough draft copy
*2 Type/key letters
*3 Type/key memos
*4 Type/key tables
*5 Type/key manuscripts
*6 Type/key technical reports
*7 Type/key special pages for manuscripts or reports such as cover page, table of contents or bibliography
*8 Type/key outlines
*9 Type/key information on cards such as postal cards, index cards, file cards or address-finder cards
*10 Type/key labels such as address labels, file folder labels or file drawer labels
11 Transcribe dictation from recorded media
*12 Maintain all hard copy files and records
*13 Type/key forms
14 Input data using optical character recognition equipment

DUTY B: Performing Telecommunications Activities

TASKS:
*1 Process incoming telephone calls
*2 Process outgoing telephone calls
*3 Maintain lists of telephone numbers such as numbers frequently called, emergency numbers or employee extension numbers
4 Maintain telephone listings on computer or word processor
*5 Take messages and get them to correct employee
6 Record outgoing long distance telephone calls

DUTY C: Maintaining Office Equipment

TASKS:
*1 Change office equipment ribbons, printwheels, and fonts
*2 Clean office equipment
3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Repair minor office equipment malfunctions
5 Recommend service on office equipment
*6 Load/change paper in printer
7 Record operating and down time

DUTY D: Performing Clerical Activities

TASKS:
*1 Duplicate materials on photocopying machine
*2 Collate and bind documents
3 Verify calculations made by others
*4 Clean and straighten up work area
5 Equip desk with office supplies and office forms
6 Resolve user problems
7 Prepare worker production log
8 Process incoming/outgoing mail
*9 Follow procedures to maintain confidentiality of data
10 Maintain system access security

DUTY E: Filing Materials Manually

TASKS:
*1 Code materials for filing
*2 Sort materials for alphabetic filing
*3 Sort materials for numeric filing
*4 Sort materials for subject filing
*5 File materials using alphabetic filing
*6 File materials using numeric filing
*7 File materials using subject filing
*8 Retrieve materials from files
9 Retrieve materials stored on microfilm or microfiche
*10 Locate misfiles
11 Transfer materials to inactive files
12 Purge files
13 Secure classified or confidential materials

DUTY F: Organizing and Planning

TASKS:
*1 Prioritize work

DUTY G: Inputting and Storing Documents and Files

TASKS:
*1 Initialize diskettes and other magnetic media
2 Input data into spreadsheet formats
3 Input data into graphs and charts
*4 Input records into data base files
*5 Prepare backup files
6 Create glossary file
7 Update spelling dictionary
*8 Store documents on diskettes and other magnetic media
*9 Retrieve documents from diskette and other magnetic media
*10 Maintain diskette files and other magnetic media
11 Input data using optical character recognition equipment
12 Create merge document

DUTY H: Editing and Correcting Documents, Records and Files

TASKS:
*1 Proofread documents for format, content and typographical errors
*2 Move (rearrange) text
*3 Search and replace text
*4 Insert/delete text
5 Rename files
*6 Insert end-of-line hyphens into text
*7 Prepare new document from existing documents
*8 Update existing records in files
9 Update data on spreadsheets
10 Delete files or records from storage
*11 Copy one diskette to another
12 Maintain backup files
13 Process text and data using integrated software
14 Assemble documents from stored text

DUTY I: Printing, Distributing, and Receiving Output

TASKS:
*1 Print documents or reports
*2 Print information according to specific criteria
3 Transmit documents or reports via modem
4 Receive documents or reports via modem
*5 Print mailing labels or envelopes
6 Transmit communications using electronic bulletin board or electronic mail
7 Monitor electronic bulletin board or electric mail
8 Print documents by interfacing word processing equipment with phototypesetting equipment
*9 Sort completed jobs for distribution

The following are incumbent workers who were involved in a consultant capacity to locally verify this task list.

Janice Eckland
FMC Corporation

Roberta Brassel-Jones
R.R. Donnelley & Sons Company

Malinda J. Kimble
Inland Steel Industries, Inc.

Derrick Moore
Vicki L. Hudson & Company

Rose D. Weeden
City of Chicago, Dept. of Police

TYPIST

DUTY A: Typewriting

TASKS:
1 Type from longhand or edited rough draft copy
2 Type letters
3 Type memos
4 Type tables
5 Type manuscripts
6 Type technical reports
7 Type special pages for manuscripts or reports such as cover page, table of contents or bibliography
8 Type outlines
9 Type information on cards such as postal cards, index cards, file cards or address-finder cards
10 Type labels such as address labels, file folder labels or file drawer labels
11 Type offset masters
12 Transcribe dictation from recorded media
13 Maintain all hard copy files and records
14 Type forms

DUTY B: Performing Telecommunications Activities

TASKS:
1 Process incoming telephone calls
2 Process outgoing telephone calls
3 Maintain lists of telephone numbers such as numbers frequently called, emergency numbers or employee extension numbers
4 Maintain telephone listings on computer or word processor
5 Take messages and get them to correct employee
6 Record outgoing long distance telephone calls

DUTY C: Maintaining Office Equipment

TASKS:
1 Change office equipment ribbons
2 Clean office equipment
3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Repair minor office equipment malfunctions
5 Recommend service on office equipment

DUTY D: Performing Clerical Activities

TASKS:
1 Duplicate materials on photocopying machine
2 Collate and bind documents
3 Verify calculations made by others
4 Clean and straighten up work area
5 Equip desk with office supplies and office forms
6 Put up bulletin board display

DUTY E: Filing Materials Manually

TASKS:
1 Code materials for filing
2 Sort materials for alphabetic filing
3 Sort materials for numeric filing
4 Sort materials for subject filing
5 File materials using alphabetic filing
6 File materials using numeric filing
7 File materials using subject filing
8 Retreive materials from files
9 Retreive materials stored on microfilm or microfiche
10 Locate misfiles
11 Transfer materials to inactive files
12 Purge files

DUTY F: Organizing and Planning

TASKS:
1 Prioritize work

DUTY G: Inputting and Storing Documents and Files

TASKS:
1 Initialize diskettes
2 Key documents from longhand or edited rough draft
3 Key documents from machine transcription
4 Key mailing labels and envelopes
5 Input data into spreadsheet formats
6 Input data into graphs and charts
7 Input records into data base files
8 Prepare backup files
9 Create glossary file
10 Store repetitive material
11 Update spelling dictionary
12 Store documents on diskettes

DUTY H: Editing and Correcting Documents, Records and Files

TASKS:
1 Proofread documents for format, content and typographical errors
2 Move (rearrange) text
3 Search and replace text
4 Insert text
5 Rename files
6 Insert end-of-line hyphens into text
7 Prepare new document from existing documents
8 Add new records to files
9 Update existing records in files
10 Update data on spreadsheets
11 Revise stored repetitive material
12 Verify data and correct errors
13 Delete text, files or records from storage
14 Copy one diskette to another
15 Maintain backup files
16 Process text and data using integrated software

17 Assemble documents from stored text

DUTY I: Printing, Distributing and Receiving Output

TASKS:
1 Print documents or reports using single-sheet paper
2 Print information according to sort criteria
3 Transmit documents or reports via modem
4 Receive documents or reports via modem
5 Print mailing labels or envelopes
6 Transmit communications using electronic bulletin board or electronic mail
7 Monitor electronic bulletin board or electric mail

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Inputting and Storing Documents and Files

TASKS:
1 Initialize diskettes
2 Key correspondence from longhand or edited rough draft
3 Key correspondence from machine transcription
4 Key business reports or manuscripts from longhand or edited rough draft
5 Key business reports or manuscripts from machine transcription
6 Key meeting minutes from longhand or edited rough draft
7 Key meeting minutes from machine transcription
8 Key outlines from longhand or edited rough draft
9 Key outlines from machine transcription
10 Key agenda from longhand or edited rough draft
11 Key agenda from machine transcription
12 Key news release from longhand or edited rough draft
13 Key news release from machine transcription
14 Input data using optical character recognition equipment
15 Input data into spreadsheet formats
16 Input data to prepare graphs and charts
17 Input data into data base files
18 Key mailing labels or envelopes
19 Key tabular information
20 Create backup files
21 Create glossary file
22 Store repetitive material
23 Update spelling dictionary

DUTY B: Editing and Correcting Documents, Records and Files

TASKS:
1 Proofread document for content, format and typographical errors
2 Move (rearrange) text
3 Search and replace text
4 Insert and delete text
5 Rename files
6 Insert end-of-line hyphens into text
7 Prepare new document from existing documents
8 Update existing records in data base files
9 Update data on spreadsheets
10 Update data on graphs and charts
11 Verify data and correct errors
12 Delete text or data from storage
13 Copy one diskette to another
14 Add data to the backup files
15 Delete data from backup files

DUTY C: Printing, Distributing and Receiving Output

TASKS:
1 Print documents or reports using continuous-feed (fanfold or pinfeed) paper
2 Print documents or reports using single-sheet paper
3 Print documents by interfacing word processing equipment with phototypesetting equipment

4 Print information according to sort criteria
5 Transmit data via modem
6 Receive data via modem
7 Separate continuous-feed forms or paper
8 Sort completed jobs for distribution
9 Print mailing labels or envelopes

DUTY D: Maintaining Office Equipment

TASKS:
1 Change ribbon on word processing unit
2 Repair minor equipment malfunctions
3 Recommend service on equipment
4 Perform maintenance functions on photocopier such as changing toner and replacing paper
5 Clean equipment
6 Change ribbon on printer
7 Change printwheel on printer
8 Load/change paper in printer
9 Report equipment malfunction to supervisor
10 Record operating and down time

DUTY E: Performing Clerical Activities

TASKS:
1 Clean and straighten up work area
2 Verify calculations made by others
3 Equip work station with supplies and forms
4 Duplicate materials on photocopying machine
5 Collate and bind documents
6 Resolve user problems
7 Prepare worker production log
8 Prioritize work
9 Process incoming telephone calls
10 Process outgoing telephone calls
11 Record outgoing long distance telephone calls
12 Process incoming mail
13 Process outgoing mail
14 Maintain mailing list electronically
15 Perform data protection procedures during power failure
16 Perform power conservation and data protection procedures during air conditioning failure
17 Follow procedures to maintain confidentiality of data
18 Maintain system access security

DUTY F: Filing Materials Manually

TASKS:
1 Maintain magnetic media file
2 Maintain software library
3 Maintain non-electronic filing system
4 Secure classified or confidential materials

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

LOCALLY VALIDATED TASK LIST
A COOPERATIVE EFFORT BETWEEN
THE NATIONAL ALLIANCE OF BUSINESS AND
THE CHICAGO PUBLIC SCHOOLS
SEPTEMBER 23, 1987

DRAFTER/COMPUTER-AIDED DRAFTER

(* Denotes entry level skills)

Duty A: Planning and Organizing Activities

Tasks:
1 Determine the requirements of a specific drafting job
2 Estimate plan quantity and sizes of drawings
*3 Apply appropriate drafting standards to drawings
*4 Select appropriate drafting techniques for assigned drawings
*5 Maintain drawing files
6 Determine project schedule

Duty B: Researching Information

Tasks:
1 Locate information using manufacturers' catalogs
2 Locate information using appropriate handbooks
3 Locate information using microfilm files
4 Locate information using computer data files
5 Determine appropriate materials and availability
6 Identify appropriate graphic standards
7 Identify appropriate interfacing personnel (Internal/External)

Duty C: Performing General Office Procedures

Tasks:
*1 Maintain rapport with interfacing personnel
2 Participate in project conferences
3 Interpret plans
4 Coordinate work with engineering personnel
5 Coordinate work with shop/field personnel
*6 Coordinate all project drawings
*7 Check plan dimensions
*8 Maintain drafting instruments and equipment
*9 File original working drawings
*10 Maintain and care for CAD work station
*11 Determine and communicate equipment failure

Duty D: Preparing Preliminary Drawings

Tasks:
*1 Draw freehand sketches
*2 Draw isometric sketches
*3 Draw orthographic sketches
*4 Draw sketches perspectives
*5 Draw oblique sketches

*6 Draw schematic sketches
*7 Read and transfer measurements and prepare scale sketches

Duty E: Performing Basic Layouts

Tasks: *1 Work from written instructions to produce drawings
*2 Work from verbal instructions to produce drawings
*3 Perform basic layouts to scale using specified tolerances

Duty F: Preparing Detail Drawings

Tasks: *1 Draw individual parts from drawings layout
*2 Draw individual parts using existing parts drawings
*3 Create assembly drawings
*4 Draw orthographic projections
*5 Draw sectional views
*6 Draw auxiliary views
*7 Draw isometric views
*8 Draw intersection and development drawings
*9 Analyze and add dimensions and tolerances to drawings
10 Apply geometric tolerances to drawings when required
*11 Apply coordinate dimensioning standards to drawings when required
12 Create bill of materials and schedules
*13 Add title block information and borders to drawings
*14 Letter drawings
*15 Add notes to drawings

Duty G: Using Reproduction Techniques

Tasks: 1 Reproduce drawings on print/photographic
2 Create hard copy using a plotter/printer
3 Copy existing drawings using digitizing techniques

Duty H: Performing Presentation Techniques

Tasks: 1 Produce renders
*2 Produce graphs, charts and diagrams
3 Produce project time schedules

Duty I: Producing Architectural Drawings

Tasks: 1 Implement local, state and federal architectural codes
2 Draw presentation floor plans

3 Draw presentation elevation views
4 Draw interior perspective views
*5 Draw exterior perspective views
6 Illustrate landscape features
*7 Sketch preliminary plan layouts
*8 Sketch preliminary elevations
*9 Sketch preliminary sections
*10 Draw scaled floor plans
*11 Draw foundation plans
*12 Draw foundation sections
*13 Reproduce common plan features
*14 Draw exterior elevations
15 Draw framing plans
*16 Draw typical wall sections
17 Draw parapet and roof drawings
*18 Draw stair sections
19 Draw fireplace sections
20 Draw chimney sections
*21 Draw door sections
*22 Draw window sections
23 Draw bathroom sections
24 Draw cabinet sections and details
25 Draw millwork (trim) sections
26 Draw door and window schedules
27 Draw finish schedules
28 Draw floor sections
29 Draw attic sections
30 Draw shaft sections
31 Draw typical closet sections
32 Prepare plumbing plans
33 Prepare HVAC plans
34 Prepare electrical and lighting plans
35 Check architectural drawings

Duty J: Drawing Light Commercial Building Plans

Tasks:
1 Draw commercial building floor plans
2 Draw commercial building foundation plans
3 Draw commercial building framing plans
4 Draw commercial building roof plans
5 Draw commercial building site plans
6 Draw commercial building elevations
7 Draw commercial building section drawings
8 Prepare commercial building door, window and finish schedules
9 Prepare commercial building plumbing plans
10 Prepare commercial building HVAC plans
11 Prepare commercial building electrical plans
12 Prepare commercial building landscape plans
13 Prepare commercial building reflective ceiling plans
14 Dimension commercial building drawings
15 Check commercial building drawings
16 Prepare commercial building material quantity/cost estimates

Duty K: Producing Structural Working Drawings

Tasks:
1 Implement local, state and federal structural codes
2 Draw structural steel plans
3 Dimension structural steel drawings
4 Draw beam connections
5 Construct column detail drawings
6 Construct detail truss drawings for timber
7 Prepare structural foundation and slab plans
8 Prepare structural floor framing plans
9 Prepare structural roof framing plans
10 Draw structural sections and details
11 Draw structural concrete foundation plans
12 Prepare column and beam schedule for structural steel
13 Prepare column and beam schedule for reinforcing steel
14 Prepare bills of materials from structural drawings
15 Check structural drawings

Duty L: Producing Mechanical Working Drawings

Tasks:
*1 Prepare mechanical orthographic assembly drawings
*2 Prepare mechanical orthographic subassembly drawings
3 Detail components of mechanical orthographic assembly drawings
4 Detail components of mechanical orthographic subassembly drawings
5 Prepare mechanical isometric assembly drawings
6 Prepare mechanical isometric subassembly drawings
7 Prepare mechanical isometric exploded view drawings
8 Prepare jig drawings
9 Prepare fixture drawings
*10 Prepare sheet metal development drawings
11 Prepare HVAC equipment and duct drawings
12 Prepare forming die drawings
13 Prepare bills of materials from mechanical drawings
14 Check mechanical drawings

Duty M: Producing Electrical and Electronic Working Drawings

Tasks:
1 Implement local, state and federal electrical codes
2 Draw electrical block diagrams
*3 Draw electrical schematic diagrams
4 Draw electrical connection diagrams
5 Draw electronic block diagrams

6 Draw electronic schematic diagrams
7 Prepare bills of materials from electrical/electronic drawings
8 Draw electronic connection diagrams
*9 Draw industrial controls ladder diagrams
10 Draw electrical power single-line diagrams
11 Check electrical/electronic drawings

Duty N: Producing Civil Engineering Drawings

Tasks:
1 Implement local, state and federal civil engineering codes
2 Produce detailed construction drawings
3 Develop topographical profiles
4 Develop specification sheets for highway construction
5 Develop specification sheets for river and harbor improvements
6 Produce plans for flood control

Duty O: Using CAD Command Processes

Tasks:
*1 Prepare basic CAD drawing
2 Start up, log on, retrieve, save, log off and shut down CAD system
3 Build data base
4 Edit data base
5 Create plotter files
6 Create disk files
7 Copy disk files
8 Execute specialized programs
9 Develop backup files
10 Restore backup files
11 Develop configure/control changes
12 Develop execute lists using command language
13 Write simple FORTRAN program
14 Manipulate files

Duty P: Producing Drawings Using CAD

Tasks:
1 Generate grid on drawing
2 Select appropriate geometric commands
3 Develop three-dimensional drawings
4 Select appropriate line work, weights and color
5 Develop layering techniques and check for consistency

The following are incumbent workers who were involved in a consultant capacity to locally verify this task list.

Robert Brausch
Sargent-Lundy Engineers

Bancherd Chitrarachis
D'Escoto, Inc.

Jessie Espinosa
D'Escoto, Inc.

Ray Karenas
Castle Engineering Co.

Steve Pissarrerk
Barnes & Reinecke, Inc.

Nelson Rodriguez
D'Escoto, Inc.

William Scheib
Ballas Engineering

DRAFTER/COMPUTER-AIDED DRAFTER

Duty A: Planning and Organizing Activities

Tasks:
1 Determine scope of a drafting job
2 Determine numbers and sizes of drawings
3 Apply appropriate drafting standards to drawings
4 Select appropriate drafting techniques for assigned drawings
5 Maintain supporting documents for drawing files

Duty B: Researching Information

Tasks:
1 Locate information using manufacturers' catalogs
2 Locate information using engineering handbooks
3 Locate information using microfilm files
4 Locate information using computer data files
5 Confirm materials availability
6 Research architectural graphic standards

Duty C: Performing General Office Procedures

Tasks:
1 Maintain client rapport
2 Participate in client conferences
3 Interpret plans
4 Coordinate work with engineering personnel
5 Coordinate work with welding shop personnel
6 Coordinate work with sheet metal shop personnel
7 Coordinate architectural drawings
8 Coordinate civil drawings
9 Coordinate structural drawings
10 Coordinate mechanical drawings
11 Coordinate electrical drawings
12 Coordinate other drawings
13 Check plan dimensions
14 Maintain drafting instruments and equipment
15 Clean drafting instruments and equipment
16 File original working drawings
17 Maintain and care for CAD work station
18 Start up, log/on, retrieve, save, log/off and shut down CAD system
19 Analyze and communicate equipment failure
20 Produce schedules

Duty D: Preparing Sketches

Tasks:
1 Draw freehand sketches
2 Draw isometric sketches
3 Draw orthographic sketches
4 Draw pictorial sketches
5 Read and transfer measurements
6 Prepare proportional design sketches
7 Draw oblique sketches

Duty E: Performing Basic Layouts

Tasks:
1 Work from written instructions to produce drawings
2 Work from verbal instructions to produce drawings
3 Perform basic layouts to specified tolerances
4 Render designs in pencil

Duty F: Detailing Drawings

Tasks:
1 Draw individual parts from assembly drawings
2 Draw individual parts from existing parts
3 Interpret assembly drawings
4 Draw orthographic projections
5 Draw sectional views
6 Draw auxiliary views
7 Draw isometric views
8 Draw intersection and development drawings
9 Dimension and tolerance drawings
10 Apply geometric tolerances to drawings
11 Apply standard fits to drawings
12 Apply x-y coordinate dimensioning standards to drawings
13 Add title block information to drawings
14 Letter presentation drawings
15 Note special instructions on drawings

Duty G: Using Reproduction Techniques

Tasks:
1 Reproduce drawings on blueprint machines
2 Reproduce drawings on dry copy machines
3 Create hard copy using a plotter
4 Create hard copy using a printer
5 Copy existing drawings using digitizing techniques

Duty H: Performing Presentation Techniques

Tasks:
1 Prepare plan abbreviations list
2 Produce graphs
3 Produce flow diagrams

Duty I: Producing Architectural Drawings

Tasks:
1 Construct architectural symbols
2 Produce representative architectural drawings
3 Interpret local, state and federal architectural codes
4 Complete FHA specification forms
5 Check architectural drawings
6 Draw presentation floor plans
7 Draw presentation elevation views
8 Draw one point interior presentation views
9 Draw two point interior presentation views
10 Draw exterior perspective views

11 Illustrate landscape features
12 Sketch preliminary plan layouts
13 Sketch preliminary elevations
14 Sketch preliminary sections
15 Draw scaled floor plans
16 Draw foundation plans
17 Draw foundation sections
18 Reproduce common plan features
19 Draw exterior elevations
20 Draw framing plans
21 Draw typical wall sections
22 Draw parapet and roof sections
23 Dimension section drawings
24 Draw stair sections
25 Draw fireplace sections
26 Draw chimney sections
27 Draw door sections
28 Draw window sections
29 Draw bathroom sections
30 Draw cabinet sections and details
31 Draw millwork (trim) sections
32 Draw door and window schedules
33 Draw finish schedules
34 Draw floor sections
35 Draw attic sections
36 Draw shaft sections
37 Draw typical closet sections
38 Prepare residential house plumbing plans
39 Prepare residential house HVAC plans
40 Prepare residential house electrical plans

Duty J: Drawing Light Commercial Building Plans

Tasks:
1 Draw commercial building floor plans
2 Draw commercial building foundation plans
3 Draw commercial building framing plans
4 Draw commercial building roof plans
5 Draw commercial building site plans
6 Draw commercial building elevations
7 Construct commercial building section drawings
8 Prepare commercial building door, window and finish schedules
9 Prepare commercial building plumbing plans
10 Prepare commercial building HVAC plans
11 Prepare commercial building electrical plans
12 Prepare commercial building landscape plans
13 Dimension commercial building plans
14 Check commercial building plans
15 Prepare commercial building quantity estimates

Duty K: Producing Structural Working Drawings

Tasks:
1 Construct structural drafting symbols
2 Interpret local, state and federal structural codes

3 Prepare bills of materials from structural drawings
4 Draw structural steel plans
5 Dimension structural steel drawings
6 Draw beam connections
7 Construct column detail drawings
8 Construct detail truss drawings for timber
9 Prepare structural foundation and slab plans
10 Prepare structural floor framing plans
11 Prepare structural roof framing plans
12 Draw structural sections and details
13 Draw structural concrete foundation plans
14 Prepare column and beam schedule for structural steel
15 Prepare column and beam schedule for reinforcing steel
16 Check structural drawings

Duty L: Producing Mechanical Working Drawings

Tasks:
1 Construct mechanical drafting symbols
2 Construct sheet metal drafting symbols
3 Construct tool design symbols
4 Prepare bills of materials from mechanical drawings
5 Produce parts lists for mechanical assembly drawings
6 Construct mechanical orthographic assembly drawings
7 Construct mechanical orthographic subassembly drawings
8 Detail components of mechanical orthographic assembly drawings
9 Detail components of mechanical orthographic subassembly drawings
10 Construct mechanical isometric assembly drawings
11 Construct mechanical isometric subassembly drawings
12 Construct mechanical isometric exploded view drawings
13 Construct jig drawings
14 Construct fixture drawings
15 Construct sheet metal development drawings
16 Construct HVAC drawings
17 Construct forming die drawings
18 Check mechanical drawings
19 Design new equipment

Duty M: Producing Electrical and Electronic Working Drawings

Tasks:
1 Construct electrical drafting symbols
2 Construct electronic drafting symbols
3 Prepare bills of materials from electrical drawings
4 Prepare bills of materials from electronic drawings
5 Interpret local, state and federal electrical codes
6 Draw electrical block diagrams
7 Draw electrical schematic diagrams
8 Draw electrical connection diagrams
9 Draw electronic block diagrams
10 Draw electronic schematic diagrams
11 Draw electronic connection diagrams
12 Draw industrial controls ladder diagrams
13 Draw electrical power single-line diagrams

Duty N: Producing Civil Engineering Drawings

Tasks:
1 Produce detailed construction drawings
2 Develop topographical profiles
3 Develop specification sheets for highway construction
4 Develop specification sheets for river and harbor improvements
5 Produce plans for flood control

Duty O: Using CAD Command Processes

Tasks:
1 Build data base
2 Edit data base
3 Create plotter files
4 Create disk files
5 Copy disk files
6 Execute specialized programs
7 Develop backup files
8 Restore backup files
9 Develop configure/control changes
10 Develop execute lists using command language
11 Write simple FORTRAN program

Duty P: Producing Drawings Using CAD

Tasks:
1 Generate grid on drawing
2 Select appropriate geometry to create lines, circles and arcs
3 Select appropriate geometry to create curves, tangents, fillets, chamfers and bevels
4 Develop three-dimensional drawings
5 Select appropriate line work, weights and color
6 Apply layering techniques

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

LOCALLY VALIDATED TASK LIST
A COOPERATIVE EFFORT BETWEEN
THE NATIONAL ALLIANCE OF BUSINESS AND
THE CHICAGO PUBLIC SCHOOLS
SEPTEMBER 28, 1987

COOK, RESTAURANT/CHEF

(* Denotes entry level skills)

DUTY A: Following Safety Procedures

TASKS:
1 Check work area for safety hazards
2 Remove safety hazards from work area
3 Report safety violations
4 Administer emergency first aid techniques
5 Complete accident reports and records

DUTY B: Cleaning and Sanitizing

TASKS:
1 Clean and sanitize immediate work area
2 Clean and sanitize standard kitchen equipment
3 Clean and sanitize windows and walls in work station
4 Clean and sanitize dry food cabinets
5 Clean and sanitize refrigerated and freezer storage
6 Clean and sanitize cooking and baking utensils
7 Clean and sanitize beverage dispensers

DUTY C: Performing Specialty Service

TASKS:
1 Prepare flaming foods at tableside
2 Serve flaming foods at tableside
3 Carve meat at tableside
4 Toss salad at tableside

DUTY D: Conducting Cost-Control Procedures

TASKS:
1 Receive beverages
2 Purchase food supplies
3 Receive food supplies
4 Store food supplies
5 Issue food supplies from requisition
6 Inventory food supplies
7 Purchase nonfood supplies
8 Receive nonfood supplies
9 Store nonfood supplies
10 Purchase dinnerware, flatware and glassware
11 Schedule food preparation tasks
12 Inventory beverages
13 Specify hot table layout and portion control measures for meal service

14 Analyze operation layout and flow design for efficiency
15 Organize work areas for efficiency of time and motion
16 Purchase equipment
17 Requisition equipment
18 Receive equipment
19 Issue equipment
20 Verify maintenance services completed
21 Requisition food supplies from work station
22 Requisition nonfood supplies from work station
23 Develop and standardize recipes

DUTY E: Coordinating Food Orders

TASKS:
1 Receive food orders
2 Schedule preparation of food items
3 Tally menu items
4 Determine meal census
5 Make food item adjustments for emergency
6 Arrange food items on dinnerware
7 Use food leftovers

DUTY F: Managing a Food Service Operation

TASKS:
1 Determine cost-control procedures
2 Determine personnel policies and procedures
3 Determine safety procedures
4 Determine accident prevention techniques
5 Explain established policies and procedures to employees
6 Monitor compliance with policies and procedures
7 Determine sanitation procedures
8 Conduct safety drills
9 Inspect for signs of rodents and insects
10 Maintain compliance with laws and statutes dealing with food service establishments
11 Determine food and beverage items to make up menus
12 Cost out menu items
13 Determine layout and design of menus
14 Update menus
15 Evaluate effectiveness and efficiency of food service operations
16 Survey market for new products and equipment
17 Determine operating budget
19 Advertise food service operation
18 Collect specimens for bacterial culturing

DUTY G: Managing Personnel

TASKS:
1 Determine staff needs
2 Interview prospective employees
3 Monitor compliance with federal and state hiring laws
4 Explain benefits to employees
5 Analyze job tasks

6 Determine standards for job performance
7 Complete employee evaluation forms
8 Discuss evaluation with staff member
9 Train staff on cooking duties
10 Train staff on baking duties
11 Train staff on safety procedures
12 Train staff on sanitation procedures
13 Train staff on management activities
14 Schedule work hours for employees
15 Conduct staff training sessions
16 Conduct informational staff meetings
17 Settle conflicts between employees
18 Prepare organizational chart
19 Determine staff abilities

DUTY H: Preparing Appetizers

TASKS:
1 Prepare cocktail appetizers
2 Prepare hors d'oeuvres
3 Prepare canapés
4 Prepare relishes
5 Prepare dips
6 Prepare spreads
7 Prepare finger sandwiches
8 Prepare soup appetizers
9 Prepare salad appetizers
10 Prepare vegetable appetizers
11 Prepare beverage appetizers

DUTY I: Preparing Garnishes

TASKS:
*1 Prepare vegetable garnishes
*2 Prepare fruit garnishes
3 Prepare egg garnish

DUTY J: Preparing Stock, Soups and Sauces

TASKS:
*1 Prepare rou
2 Prepare convenience stock
3 Prepare brown stock
4 Prepare clear stock for veal, chicken, and fish
5 Prepare au jus
6 Prepare convenience soups such as canned, frozen and dehydrated soups
7 Prepare clear soups such as consomme and broths
8 Prepare thick soups such as legume, vegetable, chowder, cream and bisque
9 Prepare cold soups
10 Prepare lead or mother sauces such as brown sauce (espagnole), white sauce (bechamel), tomato sauce, velouté sauce and hollandaise sauce

11 Prepare secondary sauces
12 Prepare hot specialty sauces
13 Prepare cold specialty sauces

DUTY K: Preparing Icings

TASKS: *1 Prepare butter cream icing
2 Prepare cooked icing

DUTY L: Preparing Cakes

TASKS: 1 Prepare fruit cakes
2 Prepare sponge-type cakes such as angel food and chiffon
3 Prepare batter cakes such as white, chocolate, yellow, spice, marble, carrot and German chocolate
4 Decorate cakes
5 Prepare ice cream cakes

DUTY M: Preparing Toppings and Fillings

TASKS: 1 Prepare whipped creams
2 Prepare meringues
3 Prepare marshmallow toppings
4 Prepare fruit fillings
5 Prepare cream fillings
6 Prepare custard fillings
7 Prepare chiffon fillings
8 Prepare speciality toppings

DUTY N: Preparing Quickbreads

TASKS: 1 Prepare muffins
2 Prepare pan breads
3 Prepare baking powder biscuits
4 Prepare popovers

DUTY O: Preparing Cookies

TASKS: 1 Prepare hand-cut cookies
2 Prepare machine-cut cookies
3 Prepare drop cookies
4 Prepare refrigerator cookies
5 Prepare bar cookies
6 Prepare bag cookies

DUTY P: Preparing Pies

TASKS:
1 Prepare crusts
2 Prepare crumb-crust pies
3 Prepare single-crust pies
4 Prepare double-crust pies
5 Prepare pies using pre-baked shells
6 Prepare pies with custard fillings, both cooked and instant
7 Prepare fruit-filled pies

DUTY Q: Preparing Yeast-Raised Products

TASKS:
1 Prepare yeast-raised sweetdough products such as rolls, coffee cakes and Danish pastries
2 Prepare fried yeast-raised products such as doughnuts and rolls
3 Prepare yeast-raised bread dough products such as dinner rolls, croissants, and demiloaves
4 Prepare yeast-raised specialty products such as bagels and pretzels

DUTY R: Preparing Vegetables

TASKS:
*1 Prepare vegetables for cooking
*2 Steam vegetables
3 Grill vegetables
4 Broil vegetables
*5 Sauté vegetables
*6 Deep-fry vegetables
*7 Bake vegetables
8 Poach vegetables
9 Stir-fry vegetables
10 Marinate vegetables
11 Prepare vegetable casseroles
*12 Boil vegetables
*13 Prepare raw vegetables

DUTY S: Preparing Desserts

TASKS:
1 Prepare frozen cakes
2 Prepare tortes
3 Prepare cheesecakes
4 Prepare ice creams
5 Prepare fruits for dessert
6 Prepare ices
7 Prepare sorbets
8 Prepare custards
9 Prepare chiffons
10 Prepare puddings
11 Prepare gelatins

DUTY T: Preparing Fruits

TASKS:
*1 Prepare fruits for serving raw
2 Steam fruits
3 Broil fruits
4 Bake fruits
5 Poach fruits
6 Saute fruits
7 Deep-fry fruits
8 Marinate fruits

DUTY U: Preparing Salads

TASKS:
*1 Prepare fruit salads
*2 Prepare vegetable salads
3 Prepare gelatin salads
*4 Prepare leafy green salads
5 Prepare meat salads
6 Prepare cheese salads
7 Prepare seafood salads
8 Prepare pasta salads
9 Prepare oil-based salad dressings
10 Prepare mayonnaise-based salad dressings
11 Prepare diet salad dressings
12 Prepare fruit salad dressings

DUTY V: Preparing Sandwiches

TASKS:
*1 Prepare sandwich items such as meats, cheeses and sandwich spreads
*2 Prepare hot sandwiches
*3 Prepare cold sandwiches

DUTY W: Preparing Foods for Breakfast

TASKS:
1 Boil eggs
*2 Fry eggs
3 Poach eggs
4 Bake eggs
*5 Scramble eggs
*6 Prepare omelets
*7 Prepare hot cereals
*8 Make quickbreads such as waffles, pancakes and French toast
*9 Prepare sausage links and patties
10 Prepare ham
*11 Prepare hash
*12 Prepare bacon
*13 Prepare steak
*14 Prepare Canadian bacon
*15 Grill hash browns

*16 Panfry American fries
*17 Panfry cottage fries
*18 Toast bread
*19 Toast English muffins

DUTY X: Preparing Meats, Poultry, Fish and Shellfish

TASKS:
1 Break down and portion primal or wholesale cuts of beef into secondary or retail cuts
2 Break down and portion primal or wholesale cuts of pork into secondary or retail cuts
3 Break down and portion primal or wholesale cuts of lamb into secondary or retail cuts
4 Break down and portion primal or wholesale cuts of veal into secondary or retail cuts
5 Break down and portion poultry
6 Prepare shellfish for cooking
7 Fillet fish
8 Grind meats
9 Tenderize meats
10 Prepare meat casseroles
11 Broil meats such as beef, pork, veal and lamb
12 Deep-fry meats such as beef, pork, veal and lamb
13 Panfry meats such as beef, pork, veal and lamb
*14 Grill meats such as beef, pork, veal and lamb
15 Roast meats such as beef, pork, veal and lamb
16 Barbecue meats such as beef, pork, veal and lamb
17 Sauté meats such as beef, pork, veal and lamb
18 Stew meats such as beef, pork, veal and lamb
19 Braise meats such as beef, pork, veal and lamb
20 Bake/roast poultry
21 Broil poultry
22 Barbecue poultry
23 Panfry poultry
24 Deep-fry poultry
25 Saute poultry
26 Stew poultry
27 Braise poultry
28 Simmer poultry
29 Bake fish
30 Broil fish
31 Barbecue fish
32 Panfry fish
33 Deep-fry fish
34 Saute fish
35 Poach fish
36 Bake shellfish
37 Broil shellfish
38 Panfry shellfish
39 Deep-fry shellfish
40 Sauté shellfish
41 Poach shellfish
42 Poach variety meats

43 Prepare prefabricated meats
44 Marinate meats, poultry, fish, and shellfish
45 Boil meats, poultry, fish, and shellfish
46 Char-broil meats, poultry, fish, and shellfish
47 Steam meats, poultry, fish, and shellfish

DUTY Y: Preparing Starchy Products

TASKS:
1 Cook rice
2 Cook pasta
3 Cook barley
4 Cook grits
5 Prepare bread dressings
*6 Prepare potatoes

DUTY Z: Prepare Speciality Item

TASKS:
1 Prepare puffed pastry dough
2 Prepare souffles
3 Prepare crepes
4 Prepare mousses
5 Prepare speciality wild game items

The following are incumbent workers who were involved in a consultant capacity to locally verify this task list.

Edward Hughes
Title - First Cook
Chicago Bar Association

Jesse Whitten
Title - Supper Entree Cook
Oak Forest Hospital

Wayne Tankersley
Title - Head Chef
Chicago Public Schools

DUTY A: Following Safety Procedures

TASKS:
1 Check work area for safety hazards
2 Remove safety hazards from work area
3 Report safety violations
4 Administer emergency first aid techniques
5 Complete accident reports and records

DUTY B: Cleaning and Sanitizing

TASKS:
1 Clean and sanitize windows and walls in work station
2 Clean and sanitize beverage dispensers
3 Clean and sanitize kitchen work counters
4 Clean and sanitize dry food cabinets
5 Clean and sanitize refrigerated and freezer storage
6 Clean and sanitize cooking and baking utensils

DUTY C: Performing Specialty Service

TASKS:
1 Prepare flaming foods at tableside
2 Serve flaming foods at tableside
3 Carve meat at tableside
4 Toss salad at tableside

DUTY D: Conducting Cost-Control Procedures

TASKS:
1 Receive beverages
2 Purchase food supplies
3 Receive food supplies
4 Store food supplies
5 Issue food supplies from requisition
6 Inventory food supplies
7 Purchase nonfood supplies
8 Receive nonfood supplies
9 Store nonfood supplies
10 Purchase dinnerware, flatware and glassware
11 Schedule food preparation tasks
12 Inventory beverages
13 Specify hot table layout and portion control measures for meal service
14 Analyze operation layout and flow design for efficiency
15 Organize work areas for efficiency of time and motion
16 Purchase equipment
17 Requisition equipment
18 Receive equipment
19 Issue equipment
20 Verify maintenance services completed

21 Requisition food supplies from work station
22 Requisition nonfood supplies from work station

DUTY E: Coordinating Food Orders

TASKS:
1 Receive food orders
2 Schedule preparation of food items
3 Tally menu items
4 Tabulate types of diets
5 Determine meal census
6 Make food item adjustments for emergency
7 Arrange food items on dinnerware
8 Use food leftovers

DUTY F: Managing a Food Service Operation

TASKS:
1 Determine cost-control procedures
2 Determine personnel policies and procedures
3 Determine safety procedures
4 Determine accident prevention techniques
5 Explain established policies and procedures to employees
6 Monitor compliance with policies and procedures
7 Determine sanitation procedures
8 Conduct safety drills
9 Inspect for signs of rodents and insects
10 Exterminate rodents and insects
11 Maintain compliance with laws and statutes dealing with food service establishments
12 Determine food and beverage items to make up menus
13 Cost out menu items
14 Determine layout and design of menus
15 Update menus
16 Evaluate effectiveness and efficiency of food service operations
17 Develop and standardize recipes
18 Survey market for new products and equipment
19 Determine operating budget
20 Collect specimens for bacterial culturing

DUTY G: Managing Personnel

TASKS:
1 Determine staff needs
2 Interview prospective employees
3 Monitor compliance with federal and state hiring laws
4 Explain benefits to employees
5 Analyze job tasks
6 Determine standards for job performance

7 Complete employee evaluation forms
8 Discuss evaluation with staff member
9 Train staff on cooking duties
10 Train staff on baking duties
11 Train staff on safety procedures
12 Train staff on sanitation procedures
13 Train staff on management activities
14 Schedule work hours for employees
15 Conduct staff training sessions
16 Conduct informational staff meetings
17 Settle conflicts between employees
18 Prepare organizational chart

DUTY H: Preparing Appetizers

TASKS:
1 Prepare cocktail appetizers
2 Prepare hors d'oeuvres
3 Prepare canapés
4 Prepare relishes
5 Prepare dips
6 Prepare spreads
7 Prepare finger sandwiches

DUTY I: Preparing Garnishes

TASKS:
1 Prepare vegetable garnishes
2 Prepare fruit garnishes
3 Prepare egg garnishes

DUTY J: Preparing Stock, Soups and Sauces

TASKS:
1 Prepare convenience stock
2 Prepare brown stock
3 Prepare white stock for veal, chicken, and fish
4 Prepare au jus
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8 Prepare cold soups
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DUTY K: Preparing Icings

TASKS:
1 Prepare butter cream icing
2 Prepare cooked icing

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TASKS:
1 Prepare fruit cakes
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3 Prepare batter cakes such as white, chocolate, yellow, spice, marble, carrot and German chocolate
4 Decorate cakes
5 Prepare ice cream cakes

DUTY M: Preparing Toppings and Fillings

TASKS:
1 Prepare whipped creams
2 Prepare meringues
3 Prepare marshmallow toppings
4 Prepare fruit fillings
5 Prepare cream fillings
6 Prepare custard fillings
7 Prepare chiffon fillings

DUTY N: Preparing Quickbreads

TASKS:
1 Prepare muffins
2 Prepare pan breads
3 Prepare baking powder biscuits
4 Prepare popovers

DUTY O: Preparing Cookies

TASKS:
1 Prepare hand-cut cookies
2 Prepare machine-cut cookies
3 Prepare drop cookies
4 Prepare refrigerator cookies
5 Prepare bar cookies
6 Prepare bag cookies

DUTY P: Preparing Pies

TASKS:
1 Prepare crumb-crust pies
2 Prepare double-crust pies
3 Prepare single-crust pies
4 Prepare pies using pre-baked shells
5 Prepare pies with custard fillings, both cooked and instant
6 Prepare fruit-filled pies

DUTY T: Preparing Fruits

TASKS:
1 Prepare fruits for serving raw
2 Steam fruits
3 Broil fruits
4 Bake fruits
5 Poach fruits
6 Sauté fruits
7 Deep-fry fruits
8 Marinate fruits

DUTY U: Preparing Salads

TASKS:
1 Prepare fruit salads
2 Prepare vegetable salads
3 Prepare gelatin salads
4 Prepare leafy green salads
5 Prepare meat salads
6 Prepare cheese salads
7 Prepare seafood salads
8 Prepare pasta salads
9 Prepare oil-based salad dressings
10 Prepare mayonnaise-based salad dressings
11 Prepare diet salad dressings
12 Prepare fruit salad dressings

DUTY V: Preparing Sandwiches

TASKS:
1 Prepare sandwich items such as meats, cheeses and sandwich spreads
2 Prepare hot sandwiches
3 Prepare cold sandwiches

DUTY W: Preparing Foods for Breakfast

TASKS:
1 Boil eggs
2 Fry eggs
3 Poach eggs
4 Bake eggs
5 Scramble eggs
6 Prepare omelets
7 Prepare hot cereals
8 Make quickbreads such as waffles, pancakes and French toast
9 Prepare sausage links and patties
10 Prepare hash
11 Prepare ham
12 Prepare bacon
13 Prepare steak
14 Prepare Canadian bacon
15 Grill hash browns
16 Panfry American fries
17 Panfry cottage fries

18 Toast bread
19 Toast English muffins

DUTY X: Preparing Meats, Poultry, Fish and Shellfish

TASKS:
1 Break down and portion primal or wholesale cuts of beef into secondary or retail cuts
2 Break down and portion primal or wholesale cuts of pork into secondary or retail cuts
3 Break down and portion primal or wholesale cuts of lamb into secondary or retail cuts
4 Break down and portion primal or wholesale cuts of veal into secondary or retail cuts
5 Break down and portion poultry
6 Prepare shellfish for cooking
7 Fillet fish
8 Grind meats
9 Tenderize meats
10 Prepare meat casseroles
11 Broil meats such as beef, pork, veal and lamb
12 Deep-fry meats such as beef, pork, veal and lamb
13 Panfry meats such as beef, pork, veal and lamb
14 Grill meats such as beef, pork, veal and lamb
15 Bake meats such as beef, pork, veal and lamb
16 Barbeque meats such as beef, pork, veal and lamb
17 Sauté meats such as beef, pork, veal and lamb
18 Stew meats such as beef, pork, veal and lamb
19 Braise meats such as beef, pork, veal and lamb
20 Bake poultry
21 Broil poultry
22 Barbeque poultry
23 Panfry poultry
24 Deep-fry poultry
25 Sauté poultry
26 Stew poultry
27 Braise poultry
28 Simmer poultry
29 Bake fish
30 Broil fish
31 Barbeque fish
32 Panfry fish
33 Deep-fry fish
34 Sauté fish
35 Poach fish
36 Bake shellfish
37 Broil shellfish
38 Panfry shellfish

39 Deep-fry shellfish
40 Sauté shellfish
41 Poach shellfish
42 Poach variety meats
43 Prepare prefabricated meats

DUTY Y: Preparing Starchy Products

TASKS: 1 Cook rice
2 Cook barley
3 Cook pasta
4 Cook grits
5 Prepare bread dressings

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

LOCALLY VALIDATED TASK LIST
A COOPERATIVE EFFORT BETWEEN
THE NATIONAL ALLIANCE OF BUSINESS AND
THE CHICAGO PUBLIC SCHOOLS
OCTOBER 7, 1987

AUTOMOTIVE MECHANIC

*Entry level

Ds*Entry level can perform under direct supervision due to safety factor

DUTY A: Preparing New Vehicles

TASKS:
- *1 Perform underhood inspections
- *2 Perform underside inspections
- *3 Perform interior and exterior body inspections
- *4 Install basic accessories (e.q. electronic equipment, trim, etc)
- *5 Perform minor repairs

DUTY B: Servicing Suspension and Wheel Systems

TASKS:
- *1 Inspect suspension systems for worn parts
- 2 Remove and replace suspension bushings and king pins
- *3 Inspect tires and wheels for damage and irregular wear
- *4 Remove and replace front wheel bearings
- 5 Repack wheel bearings
- 6 Remove and replace shock absorbers
- *7 Remove and replace control arms
- 8 Remove and replace ball joints
- 9 Rebuild leaf springs assembly
- 10 Remove and replace torsion bars
- 11 Remove and replace coil springs
- 12 Remove and replace spindle
- 13 Remove and replace McPherson strut assembly
- 14 Rebuild McPherson strut assembly
- 15 Remove and replace trunnion pin assembly
- 16 Remove and replace leaf spring assembly
- 17 Remove and replace spring hangers
- 18 Remove and replace "I" beam
- *19 Remove and replace stabilizer and bushings
- 20 Rotate tires
- 21 Balance wheel and tire assembly
- 22 Replace torque arms
- *23 Adjust torsion bar

DUTY C: Performing Steering Services

TASKS:
- *1 Inspect steering gear and linkage for worn parts
- *2 Remove and replace steering linkage components
- 3 Rebuild steering column
- 4 Rebuild power steering pump
- 5 Remove and replace power steering pump and/or hoses
- 6 Rebuild rack and pinion power/manual steering assembly
- 7 Remove and replace rack and pinion power/manual steering assembly
- 8 Remove and replace power steering cylinder
- 9 Rebuild power steering cylinder
- 10 Align rear wheels
- 11 Remove and replace steering column
- 12 Rebuild recirculating ball gear box
- 13 Remove and replace recirculating ball gear box
- 14 Align front end

DUTY D: Servicing Heating and Cooling System

TASKS:
- *1 Determine cause of overheating
- *2 Test thermal sensing switch
- *3 Remove and replace thermal sensing switch
- 4 Flush cooling system
- *5 Test coolant freezing point
- *6 Install antifreeze
- *7 Inspect and replace water hoses
- 8 Remove and replace variable speed fan clutch
- *9 Remove and replace electric cooling fan motor
- *10 Chemically clean cooling system
- *11 Remove and replace thermostat
- *12 Test thermostat
- *13 Pressure test cooling system
- 14 Remove and replace heater hoses
- *15 Remove and replace radiator hoses
- *16 Remove and replace radiator
- 17 Rebuild blower assembly on air-cooled engines
- 18 Remove and replace heater cores
- 19 Remove and replace water pump

DUTY E: Servicing Brake Systems

TASKS:
- 1 Check brake operation
- 2 Inspect brake hoses and lines
- 3 Flush brake system
- 4 Adjust brake shoes
- 5 Free up parking brake cable and linkage

6 Adjust parking brake linkage
7 Remove and replace parking brake cable and linkage
8 Remove and replace parking brake external band
9 Remove and replace brake shoes/pads
10 Remove and replace brake hardware
11 Remove and replace wheel cylinder
12 Rebuild wheel cylinder
13 Cam grind brake shoe
14 Grind (turn) brake drum
15 Place backing plate
16 Remove and replace disc brake rotor
17 Reface disc brake rotor
18 Remove and replace caliper assembly
19 Rebuild caliper assembly
20 Remove and replace master cylinder
21 Rebuild master cylinder
22 Remove and replace vacuum power brake unit
23 Remove and replace hydrobrake booster unit
24 Bleed brake system
25 Remove and replace proportioning meter combination valve)
26 Test brake antilock system
27 Replace defective components in brake antilock system
28 Test rotor parallelism
29 Test rotor runout
30 Replace hydraulic lines and hoses

DUTY F: Servicing Emission Control Systems

TASKS: *1 Test emission control system
*2 Remove and replace vacuum hoses
*3 Test positive crankcase ventilation system
*4 Remove and replace positive crankcase ventilation valve
*5 Test vacuum advance/retard device
*6 Remove and replace vacuum advance/retard device
*7 Test electrical advance/retard device
*8 Check idle solenoid
*9 Remove and replace idle solenoid
*10 Remove and replace deceleration valve
*11 Test/thermostatic air cleaner adjust and/or replace
*12 Check exhaust gas recirculation valve operation
*13 Remove and replace exhaust gas recirculation valve
*14 Check air injection system
*15 Remove and Replace air injection tubing
*16 Remove and replace air pump
*17 Remove and repair diverter and anti-backfire valve

*18 Test fuel evaporation system
*19 Remove and replace closed system charcoal canister filter
*20 Test back pressure of exhaust system
*21 Remove and replace catalytic converter
*22 Remove and replace beads in catalytic converter

DUTY G: Servicing Exhaust Systems

TASKS: *1 Check exhaust system for leaks and restrictions
*2 Remove and replace exhaust system supports
*3 Remove and replace muffler
*4 Remove and replace exhaust pipe
*5 Remove and replace tail pipe
*6 Remove and replace exhaust manifold
*7 Inspect exhaust system
*8 Inspect turbocharger
*9 Replace turbocharger
10 Rebuild turbocharger

DUTY H: Servicing Heating and Air-Conditioning Systems

TASKS: *1 Inspect control cables
*2 Test electrical control circuits
3 Test vacuum components
4 Remove and replace vacuum components
5 Test air-conditioning thermal switch
6 Test blower motor
7 Remove and replace blower motor
8 Test thermostatic clutch switch
9 Remove and replace thermostatic clutch switch
10 Replace refrigeration clutch
11 Inspect air-conditioning magnetic clutch switch
12 Remove and replace air-conditioning magnetic clutch switch (piston type)
13 Inspect clutch and pulley assembly
14 Test air conditioner charge
*15 Test partial charge system
16 Perform leak test with halide torch
17 Perform leak test with electronic tester
18 Remove and replace refrigerant lines
*19 Repair refrigeration controls
20 Fabricate refrigerant lines
21 Remove and replace compressor seals
22 Check compressor oil level
23 Inspect dryer
24 Remove and replace dryer in air-conditioning unit
25 Remove and replace condenser in air-conditioning unit

26 Remove and replace evaporator
27 Remove and replace metering orifice valve (expansion valve)
28 Test throttle-suctioning valve
29 Remove and replace throttle-suctioning valve
30 Remove and replace compressor
31 Rebuild rotary compressor
32 Rebuild axial compressor
33 Remove and replace heater core
34 Install air-conditioning system
35 Remove and replace low pressure cutout switch
36 Remove and replace high pressure cutout switch
37 Evacuate and charge refrigeration system

DUTY I: Servicing Fuel Systems

TASKS:
*1 Test carburetor adjustment using combustion analyzer
*2 Test carburetor adjustment using infrared tester
*3 Test carburetor adjustment using propane enrichment apparatus
*4 Adjust carburetor idle mixture
*5 Adjust antistall device
*6 Inspect carburetor linkage for binding and worn parts
*7 Check for vacuum/fuel leaks
*8 Remove and replace carburetor air cleaner
*9 Clean automatic choke
*10 Adjust automatic choke
*11 Free up manifold heat riser valve
12 Remove and replace manifold heat riser valve
13 Clean heat riser passages
14 Adjust float
15 Adjust carburetor metering rods
16 Remove and replace carburetor metering jets
17 Remove and replace carburetor
18 Rebuild carburetor
19 Remove and replace fuel filter unit
ds*20 Test and adjust fuel pump
ds*21 Remove and replace fuel pump
22 Test and adjust fuel injection system
23 Remove and replace electrical fuel injector computer
24 Test wiring harness of electronic fuel injection system
25 Remove and replace fuel injection nozzle
26 Rebuild fuel injection nozzle
27 Remove and replace fuel injection pump
28 Rebuild fuel injection pump
29 Check waste gate adjustment

30 Adjust waste gate adjustment
31 Remove and replace fuel lines
32 Remove and replace fuel tank
ds*33 Remove and replace fuel level sending unit
ds*34 Test electronic fuel mixture control system
ds*35 Time diesel engine injector pump
36 Remove and replace injector (diesel)
37 Remove and replace injector line (diesel)
38 Test injector spray pattern (diesel)
39 Test calibration of injector lines (diesel)
40 Bleed fuel system
41 Clean fuel filter
42 Clean air cleaner element
43 Remove and replace wiring harness of electronic fuel system

DUTY J: Servicing Ignition Systems

TASKS: *1 Test engine using engine analyzer
*2 Test point dwell
*3 Remove and replace distributor cap
*4 Remove and replace distributor rotor
*5 Inspect distributor for worn parts
*6 Remove and replace points
*7 Remove and replace condenser
*8 Test condenser
*9 Remove and replace distributor
*10 Rebuild distributor
*11 Test control unit (electronic)
*12 Remove and replace control unit (electronic)
*13 Test pickup coil (electronic)
*14 Remove and replace pickup coil (electronic)
*15 Test automatic spark advance mechanism
*16 Remove and replace spark advance mechanism
*17 Adjust point dwell
*18 Test ignition timing
*19 Adjust ignition timing
*20 Test ignition coil
*21 Test primary circuit resistance
*22 Test secondary circuit continuity
*23 Test spark plug wire resistance
*24 Remove and replace spark plug wires
*25 Remove and replace spark plugs
*26 Clean spark plugs
*27 Gap spark plugs
*28 Test glow plug electrical system
*29 Test glow plug
*30 Remove and replace glow plug
*31 Test distributor

DUTY K: Servicing Automatic Transmissions

TASKS: *1 Pressure test transmission in vehicle
*2 Stall test automatic transmission in vehicle
*3 Remove and replace transmission oil and

*4 Adjust automatic transmission shift linkage
*5 Test vacuum and/or mechanical detent system
*6 Remove and replace vacuum shift modulator
*7 Adjust bands
*8 Remove and replace transmission governor
9 Clean transmission governor
10 Clean transmission valve body
11 Remove and replace automatic transmission with convertor assembly
12 Rebuild automatic transmission assembly
13 Test drive and diagnose automatic transmission
14 Remove and replace extension housing seal and bushing
15 Splice cooler lines
16 Test electrical controls of automatic clutch converter

DUTY L: Performing Engine Mechanical Diagnosis

TASKS: *1 Test cylinder balance using engine analyzer
*2 Test cylinder leakage and compression
*3 Inspect engine for vacuum leaks
*4 Inspect engine for oil leaks
*5 Inspect to determine cause of overheating
*6 Inspect cooling system for source of coolant loss
*7 Inspect valve train and guides for cause of malfunctions
*8 Inspect engine for source of mechanical engine noise

DUTY M: Servicing Engine Blocks

TASKS:ds*1 Steam clean engine
ds*2 Test oil pressure
ds*3 Remove and replace motor mounts
ds*4 Remove and replace engine assembly
ds*5 Remove and replace oil pan
ds*6 Remove and replace bearing(s)
ds*7 Inspect block for warp
ds*8 Bore cylinders
ds*9 Replace intake manifold
ds*10 Replace connecting rods and pistons
ds*11 Replace vibration damper
ds*12 Replace crankshaft assembly
ds*13 Replace camshaft assembly
ds*14 Replace oil seals
ds*15 Replace core plugs

DUTY N: Servicing Cylinder Heads and Valve Trains

Tasks:ds*1 Inspect for rocker arm lubrication
ds*2 Test valve lifters
ds*3 Remove and replace cylinder head

ds*4 Inspect cylinder head for warp or cracks
ds*5 Rebuild cylinder head
ds*6 Remove and replace timing chain or belt
ds*7 Remove and replace timing gear
ds*8 Remove and replace camshaft
ds*9 Remove and replace camshaft bearings
ds*10 Adjust hydraulic valve lifters
ds*11 Adjust mechanical valve lifters

DUTY O: Servicing Electrical Systems

TASKS:ds*1 Inspect battery electrolyte level
ds*2 Test battery with hydrometer
ds*3 Test battery for surface leakage
ds*4 Test battery voltage
ds*5 Test battery for capacity (load)
ds*6 Clean battery, posts and cable connections
ds*7 Measure ground system resistance
ds*8 Remove and replace battery cables
ds*9 Charge battery
ds*10 Test charging system output
ds*11 Test alternator output
ds*12 Remove and replace generator or alternator
ds*13 Rebuild generator
ds*14 Rebuild alternator
ds*15 Remove and replace charging system regulator
ds*16 Test starter control circuit
ds*17 Test starter current draw
ds*18 Remove and replace starter solenoid
ds*19 Test electrical motors
ds*20 Remove and replace starter
ds*21 Rebuild starter
ds*22 Test switches
ds*23 Remove and replace switches
ds*24 Test fuses
ds*25 Remove and replace fuses
ds*26 Test circuit breakers
ds*27 Remove and replace circuit breakers
ds*28 Remove and replace fuse block assembly
ds*29 Remove and replace light bulbs
ds*30 Remove and replace sockets
ds*31 Adjust headlights
ds*32 Test parking light circuit
ds*33 Remove and replace dimmer switch
ds*34 Test/repair turn signal circuit and four way circuit
ds*35 Remove and replace turn signal switch
ds*36 Adjust backup light switch
ds*37 Remove and replace backup light switch
ds*38 Adjust stop light switch
ds*39 Remove and replace stop light switch
ds*40 Check horn circuit

ds*41 Test horn relay
ds*42 Remove and replace horn relay
ds*43 Remove and replace horn
ds*44 Test windshield wiper circuit
ds*45 Remove and replace windshield wiper motor
ds*46 Test constant voltage regulator
ds*47 Remove and replace constant voltage regulator
ds*48 Adjust voltage regulator output
ds*49 Test instrument gauges
ds*50 Remove and replace instrument gauges
ds*51 Test sending units
ds*52 Remove and replace sending units
ds*53 Test warning lamps
ds*54 Remove and replace warning lamps

DUTY P: Servicing Electrical Accessories

TASKS:
1 Test malfunctioning electrical accessories
2 Remove and replace cruise control components
3 Remove and replace automatic alarm system components
4 Inspect radio speaker
5 Remove and replace radio speaker
6 Remove and replace radio antenna
7 Trim radio antenna
8 Remove and replace power antenna motor
9 Remove and replace power window motors
10 Remove and replace power seat motors
11 Remove and replace cigarette lighter receptacle
12 Replace radio components
13 Repair windshield wipers
14 Repair electrical shift mechanisms
15 Repair lighting system

DUTY Q: Servicing Manual Transmissions

TASKS:
*1 Inspect and adjust shift linkage
*2 Adjust clutch
*3 Remove and replace extension housing seal and bushing
*4 Remove and replace manual transmission
*5 Rebuild manual transmission
*6 Remove and replace clutch assembly
*7 Remove and replace hydraulic clutch slave cylinder
8 Rebuild hydraulic clutch slave cylinder
9 Remove and replace hydraulic clutch master cylinder
10 Rebuild hydraulic clutch master cylinder
11 Replace flywheel

12 Measure bellhousing runout
13 Remove and replace four-wheel-drive transfer case
14 Rebuild four-wheel-drive transfer case
*15 Check fluid levels

DUTY R: Servicing Drive Lines

TASKS: *1 Inspect drive line for worn parts
*2 Lubricate universal joint
*3 Remove and replace universal joint
*4 Remove and replace trunnion joint
*5 Lubricate speedometer cable
*6 Remove and replace speedometer cable
*7 Remove and replace speedometer drive gear
*8 Remove and replace axle seal
*9 Remove and replace axle bearing
*10 Balance drive shaft (in car)
*11 Remove and replace transmission mount
*12 Check drive line angles
13 Remove and replace differential assembly (integral)
14 Remove and replace differential assembly (removable)
15 Rebuild differential assembly (integral)
16 Rebuild differential assembly (removable)
17 Remove and replace transaxle assembly
18 Rebuild transaxle assembly
19 Remove and replace front-wheel-drive axle assemblies
20 Rebuild four-wheel-drive locking hubs
21 Remove and replace pinion seal
22 Rebuild power takeoff
23 Remove and replace drive shaft center support bearings
24 Rebuild constant velocity universal joints
*25 Remove and replace constant velocity joints
*26 Repack constant velocity joints
*27 Remove and replace constant velocity boots

DUTY S: Performing Welding and Oxy-Fuel Cutting

TASKS: *1 Set up oxy-fuel welding and cutting equipment
*2 Braze mild steel
*3 Solder copper tubing
*4 Cut mild steel with oxy-fuel equipment
*5 Set up shielded metal arc welding equipment
*6 Weld 3/16" mild steel in flat position
*7 Weld 3/16" mild steel in horizontal position
*8 Solder electrical components and wire
*9 Heat metal parts to assist in removal
*10 Weld cast iron
*11 Braze cast iron

DUTY T: Performing Diesel Engine Tune-Ups

TASKS:
- *1 Test and adjust air inductor system
- *2 Test fuel system
- *3 Adjust injector timing
- *4 Adjust valve clearance
- *5 Adjust fuel pressure
- *6 Adjust control rack
- *7 Check and adjust linkage for full throttle operation

DUTY U: Performing Safety Practices

TASKS:
- *1 Apply shop and equipment safety rules
- *2 Apply first aid procedures
- *3 Complete an accident report
- *4 Evaluate personnel safety violations
- *5 Inspect the workplace for safe working environment
- *6 Report shop safety violations
- *7 Correct safety violations
- *8 Participate in shop safety committee

DUTY V: Performing Preventative Maintenance

TASKS:
- *1 Perform underside inspections
- *2 Service crankcase lube
- *3 Service fuel filter
- 4 Perform underhood inspections
- 5 Complete lubrication operations
- 6 Service tires

DUTY W: Perform Maintenance Control Functions

TASKS:
- *1 Complete labor time cards
- *2 Complete requests for procurement of parts
- *3 Complete unsatisfactory reports
- *4 Enter work performed on work orders
- *5 Follow up on requisitions
- *6 Initiate and complete work order
- *7 Initiate request for parts
- *8 Maintain daily work control logs or status boards
- *9 Plan, schedule and control maintenance of vehicles
- *10 Prepare reports of vehicle defects
- *11 Spot check service orders

DUTY X: Performing Precision Measurements: Mechanical/Electrical

TASKS:
- *1 Measure parts using standard and metric measurement systems
- *2 Measure parts with steel rule
- *3 Measure parts using dial indicators

*4 Measure parts using outside micrometers
*5 Measure parts using inside micrometers
*6 Measure parts using depth micrometers
*7 Measure parts using special micrometers
*8 Measure parts using inside and outside calipers
*9 Measure threads
*10 Calibrate precision measuring tools
*11 Clean and store precision measuring tools

DUTY Y: Performing Chassis and Cab Maintenance

TASKS: *1 Replace torque arms
*2 Repair doors
*3 Install windshield, back and side glass
*4 Inspect and service hood
*5 Inspect and repair mirrors
*6 Inspect and service ventilation system
*7 Inspect and service seat

The following are incumbent workers who were involved in a consultant capacity to locally verify this task list.

Joesph Croughan
Manager-Mechanic
Passaglia's Auto Repair

David Michalek
Auto Mechanic
Illinois Bell

Joseph Wormack, Jr.
Automotive Instructor
Kennedy-King College

Everett Saffold
Tire and Battery Installer
Sears Automotive

Joseph Czepczynski
Auto Mechanic
Fanning Cadillac

AUTOMOTIVE MECHANIC

DUTY A: Preparing New Vehicles

TASKS:
1 Adjust and lubricate door hinges and striker plates
2 Locate water leaks
3 Seal water leaks
4 Locate duct leaks
5 Seal duct leaks
6 Locate rattles and noises
7 Install door moldings
8 Remove and replace window regulators
9 Adjust window regulators
10 Install air shocks
11 Install C.B. and radios

DUTY B: Servicing Suspension Systems

TASKS:
1 Inspect suspension systems for worn parts
2 Remove and replace suspension bushings and king pins
3 Inspect tires and wheels for damage and irregular wear
4 Remove and replace front wheel bearings (drum brakes)
5 Remove and replace front wheel bearings (disc brakes)
6 Repack wheel bearings
7 Remove and replace shock absorbers
8 Remove and replace control arms
9 Remove and replace ball joints
10 Remove and replace torsion bars
11 Remove and replace coil springs
12 Remove and replace spindle
13 Remove and replace McPherson strut assembly
14 Rebuild McPherson strut assembly
15 Remove and replace trunnion pin assembly
16 Remove and replace leaf spring assembly
17 Remove and replace spring hangers
18 Remove and replace "I" beam
19 Remove and replace stabilizer and bushings
20 Replace idler arm
21 Replace pitman arm
22 Inspect torque arms
23 Replace torque arms
24 Inspect and adjust torsion bar
25 Inspect ball joints

DUTY C: Servicing Heating and Cooling System

TASKS:
1 Determine cause of overheating
2 Test thermal sensing switch
3 Remove and replace thermal sensing switch
4 Remove and replace drive belts
5 Test coolant freezing point
6 Install antifreeze
7 Inspect and replace water hoses
8 Check variable speed fan clutch
9 Remove and replace variable speed fan clutch
10 Remove and replace electric cooling fan motor

11 Chemically clean cooling system
12 Remove and replace thermostat
13 Test thermostat
14 Test coolant pressure caps
15 Pressure test cooling system
16 Remove and replace heater hoses
17 Remove and replace radiator hoses
18 Remove and replace radiator
19 Rebuild blower assembly on air-cooled engines
20 Remove and replace heater cores
21 Remove and replace water pump

DUTY D: Performing Steering and Wheel Services

TASKS:
1 Inspect steering gear and linkage for worn parts
2 Check and service fluid level
3 Lubricate steering gear and linkage
4 Test tire pressure
5 Rotate tires
6 Balance wheel and tire assembly
7 Adjust steering sector
8 Remove and replace steering linkage components
9 Remove and replace manual steering sector
10 Remove and replace steering damper
11 Remove and replace power steering hoses
12 Remove and replace belt(s) and set tension
13 Remove and replace power steering cylinder
14 Remove and replace power steering control valve assembly
15 Rebuild power steering control valve assembly
16 Remove and replace power steering pump
17 Rebuild rack and pinion power steering assembly
18 Rebuild rack and pinion manual steering assembly
19 Adjust toe-in
20 Align front end
21 Align rear wheels
22 Remove and replace turn signal switch
23 Remove and replace ignition switch rack
24 Remove and replace steering wheel
25 Remove and replace mast jacket
26 Set center line steering
27 Check steering axis inclination
28 Remove and replace tilt wheel and telescope
29 Remove and replace power steering seals
30 Remove and replace four-way switch
31 Rebuild steering column
32 Remove and replace steering column bearings, shift tube and socket
33 Remove and replace steering column
34 Replace shift detent in column
35 Remove and replace rack and pinion power steering assembly

DUTY E: Servicing Brake Systems

TASKS:
1 Check brake operation

2 Inspect brake hoses and lines
3 Flush brake system
4 Adjust brake shoes
5 Free up parking brake cable and linkage
6 Adjust parking brake linkage
7 Remove and replace parking brake cable and linkage
8 Remove and replace parking brake external band
9 Remove and replace brake shoes
10 Remove and replace self-adjusters
11 Remove and replace wheel cylinder
12 Rebuild wheel cylinder
13 Cam grind brake shoe
14 Grind (turn) brake drum
15 Recondition backing plate
16 Remove and replace disc brake rotor
17 Reface disc brake rotor
18 Remove and replace caliper assembly
19 Rebuild caliper assembly
20 Remove and replace master cylinder
21 Rebuild master cylinder
22 Remove and replace hydraulic power brake unit
23 Remove and replace hydrobrake booster unit
24 Bleed brake system
25 Remove and replace proportioning meter (combination valve)
26 Test brake antilock system
27 Replace defective components in brake antilock system
28 Test rotor parallelism
29 Test rotor runout
30 Torque wheel lug nuts
31 Check and service fluid level
32 Replace wheels
33 Repack wheel bearings
34 Replace hydraulic lines and hoses
35 Adjust air brakes

DUTY F: Servicing Emission Control Systems

TASKS: 1 Test emission control system using propane enrichment apparatus
2 Remove and replace vacuum hoses
3 Test positive crankcase ventilation system
4 Remove and replace positive crankcase ventilation valve
5 Remove and replace positive crankcase ventilation valve hose(s)
6 Test vacuum advance/retard device
7 Remove and replace vacuum advance/retard device
8 Test electrical advance/retard device
9 Check idle solenoid
10 Remove and replace idle solenoid
11 Remove and replace deceleration valve
12 Test thermostatic air cleaner
13 Adjust thermostatic air cleaner
14 Remove and replace thermostatic air cleaner
15 Check exhaust gas recirculation valve operation
16 Remove and replace exhaust gas recirculation valve

17 Check air injection system
18 Remove and replace air pump
19 Remove and repair diverter and anti-backfire valve
20 Test fuel evaporation system
21 Remove and replace closed system charcoal canister filter
22 Test back pressure of exhaust system
23 Remove and replace catalytic converter
24 Remove and replace beads in catalytic converter
25 Test exhaust oxygen sensor
26 Remove and replace exhaust oxygen sensor
27 Test electronic fuel mixture control system

DUTY G: Servicing Exhaust Systems

TASKS:
1 Check exhaust system for leaks and restrictions
2 Remove and replace exhaust system supports
3 Remove and replace converter beads
4 Remove and replace catalytic converter
5 Remove and replace muffler
6 Remove and replace exhaust pipe
7 Remove and replace tail pipe
8 Remove and replace exhaust manifold
9 Inspect exhaust system
10 Inspect exhaust manifold
11 Inspect turbocharger
12 Replace turbocharger
13 Rebuild turbocharger

DUTY H: Servicing Heating and Air-Conditioning Systems

TASKS:
1 Inspect control cables
2 Test electrical control circuits
3 Remove and replace compressor belts
4 Test vacuum components
5 Remove and replace vacuum components
6 Test air-conditioning thermal switch
7 Test blower motor
8 Remove and replace blower motor
9 Test thermostatic clutch switch
10 Remove and replace thermostatic clutch switch
11 Inspect air-conditioning magnetic clutch switch
12 Remove and replace air-conditioning magnetic clutch switch (piston type)
13 Inspect clutch and pulley assembly
14 Remove and replace clutch and hub assembly (rotary type)
15 Test air conditioner charge
16 Charge system using pound cans
17 Charge system using bulk source
18 Perform leak test with halide torch
19 Perform leak test with electronic tester
20 Remove and replace refrigerant lines
21 Fabricate refrigerant lines
22 Remove and replace compressor seals
23 Check compressor oil level

24 Inspect dryer
25 Remove and replace dryer in air-conditioning unit
26 Remove and replace condenser in air-conditioning unit
27 Remove and replace evaporator
28 Remove and replace metering orifice valve (expansion valve)
29 Test throttle-suctioning valve
30 Remove and replace throttle-suctioning valve
31 Test compressor reed plates
32 Remove and replace compressor reed plates
33 Remove and replace compressor
34 Rebuild rotary compressor (swash-plate)
35 Remove and replace heater core
36 Install air-conditioning system
37 Remove and replace low pressure cutout switch
38 Remove and replace high pressure cutout switch
39 Evacuate and charge refrigeration system
40 Check system for leaks
41 Replace refrigeration clutch
42 Inspect refrigeration controls
43 Repair refrigeration controls

DUTY I: Servicing Fuel Systems

TASKS:
1 Test carburetor adjustment using combustion analyzer
2 Test carburetor adjustment using infrared tester
3 Test carburetor adjustment using propane enrichment apparatus
4 Adjust carburetor idle mixture
5 Adjust antistall device
6 Inspect carburetor linkage for binding and worn parts
7 Check carburetor for vacuum leaks
8 Remove and replace carbureter air cleaner
9 Clean automatic choke
10 Adjust automatic choke
11 Free up manifold heat riser valve
12 Remove and replace manifold heat riser valve
13 Clean heat riser passages
14 Adjust float
15 Adjust carburetor metering rods
16 Remove and replace carburetor metering jets
17 Remove and replace carbureter
18 Rebuild carbureter
19 Remove and replace fuel filter unit
20 Test and adjust fuel pump
21 Remove and replace fuel pump
22 Test and adjust fuel injection system
23 Remove and replace electrical fuel injector computer
24 Test wiring harness of electronic fuel injection system
25 Remove and replace fuel injection nozzle
26 Rebuild fuel injection nozzle
27 Remove and replace fuel injection pump
28 Rebuild fuel injection pump
29 Check waste gate adjustment
30 Adjust waste gate adjustment
31 Remove and replace turbocharger

32 Rebuild turbocharger
33 Remove and replace fuel lines
34 Remove and replace fuel tank
35 Remove and replace fuel level sending unit
36 Test electronic fuel mixture control system
37 Time diesel engine injector pump
38 Remove and replace injector (diesel)
39 Remove and replace injector line (diesel)
40 Test injector spray pattern (diesel)
41 Test calibration of injector lines (diesel)
42 Bleed fuel system
43 Clean fuel filter
44 Check air cleaner element
45 Clean air cleaner element
46 Remove and replace wiring harness of electronic fuel system

DUTY J: Servicing Ignition Systems

TASKS:
1 Test engine using engine analyzer
2 Test point dwell
3 Remove and replace distributor cap
4 Remove and replace distributor rotor
5 Inspect distributor for worn parts
6 Remove and replace points
7 Remove and replace condenser
8 Test condenser
9 Remove and replace distributor
10 Rebuild distributor
11 Test control unit (electronic)
12 Remove and replace control unit (electronic)
13 Test pickup coil (electronic)
14 Remove and replace pickup coil (electronic)
15 Test automatic spark advance mechanism
16 Remove and replace spark advance mechanism
17 Adjust point dwell
18 Test ignition timing
19 Adjust ignition timing
20 Test ignition coil
21 Test primary circuit resistance
22 Test secondary circuit continuity
23 Test spark plug wire resistance
24 Remove and replace spark plug wires
25 Remove and replace spark plugs
26 Clean spark plugs
27 Gap spark plugs
28 Test glow plug electrical system
29 Test glow plug
30 Remove and replace glow plug
31 Test solenoid
32 Replace solenoid
33 Test distributor
34 Time distributor to engine
35 Test generator/alternator
36 Replace generator/alternator
37 Test regulator

38 Replace regulator

DUTY K: Servicing Automatic Transmissions

TASKS:
1 Pressure test transmission in vehicle
2 Stall test automatic transmission in vehicle
3 Clean transmission oil strainer
4 Remove and replace transmission oil filter
5 Adjust automatic transmission shift linkage
6 Test vacuum shift modulator
7 Remove and replace vacuum shift modulator
8 Adjust bands
9 Remove and replace transmission governor
10 Clean transmission governor
11 Clean transmission valve body
12 Remove and replace automatic transmission with convertor assembly
13 Remove and replace automatic transmission without convertor assembly
14 Rebuild automatic transmission assembly
15 Measure convertor turbine end play
16 Air pressure test transmission on bench
17 Pressure flush converter assembly
18 Pressure flush automatic transmission cooler assembly
19 Remove and replace torque converter
20 Remove and replace extension housing seal and bushing
21 Splice cooler lines
22 Replenish transmission oil
23 Test electrical controls of automatic clutch converter
24 Inspect and replace automatic transmission
25 Inspect and service drive shaft and U-joints
26 Replace U-joints
27 Replace single speed differential
28 Rebuild single speed differential
29 Replace axles and seals

DUTY L: Performing Engine Mechanical Diagnosis

TASKS:
1 Test cylinder balance using engine analyzer
2 Test cylinder leakage
3 Inspect engine for vacuum leaks
4 Inspect engine for oil leaks
5 Inspect to determine cause of overheating
6 Inspect cooling system for source of coolant loss
7 Inspect valve train and guides for cause of malfunctions
8 Inspect engine for source of mechanical engine noise

DUTY M: Servicing Engine Blocks

TASKS:
1 Steam clean engine
2 Test oil pump pressure
3 Test oil pressure relief valve
4 Remove and replace motor mounts

5 Remove and replace engine assembly
6 Remove and replace oil pan
7 Remove and replace rod bearing(s)
8 Remove and replace crankshaft
9 Inspect block for warp
10 Bore cylinders
11 Hone cylinders
12 Install cam bearings
13 Assemble short block
14 Check engine compression
15 Replace intake manifold
16 Inspect and replace exhaust manifold
17 Replace clutch assembly
18 Replace turboblower
19 Replace water pump
20 Replace cylinder heads
21 Replace connecting rods and pistons
22 Replace vibration damper
23 Replace crankshaft assembly
24 Replace camshaft assembly
25 Replace oil seals
26 Replace freeze plugs

DUTY N: Servicing Cylinder Heads and Valve Trains

Tasks:
1 Inspect for rocker arm lubrication
2 Remove and replace intake manifold
3 Test valve lifters
4 Remove and replace cylinder head
5 Inspect cylinder head for warp or cracks
6 Rebuild cylinder head
7 Remove and replace harmonic balancer
8 Remove and replace timing chain or belt
9 Remove and replace timing gear
10 Remove and replace camshaft
11 Remove and replace camshaft bearings
12 Adjust hydraulic valve lifters
13 Adjust mechanical valve lifters

DUTY O: Servicing Electrical Systems

TASKS:
1 Inspect battery electrolyte level
2 Test battery with hydrometer
3 Test battery for surface leakage
4 Test battery voltage
5 Test battery for capacity (load)
6 Clean battery, posts and cable connections
7 Measure ground system resistance
8 Remove and replace battery cables
9 Charge battery
10 Test charging system output
11 Test alternator output
12 Remove and replace generator or alternator
13 Rebuild generator

14 Rebuild alternator
15 Remove and replace charging system regulator
16 Test starter control circuit
17 Test starter current draw
18 Remove and replace starter solenoid
19 Test electrical motors
20 Remove and replace starter
21 Rebuild starter
22 Test switches
23 Remove and replace switches
24 Test fuses
25 Remove and replace fuses
26 Test circuit breakers
27 Remove and replace circuit breakers
28 Remove and replace fuse block assembly
29 Inspect lighting system for faulty bulbs
30 Remove and replace light bulbs
31 Remove and replace sockets
32 Adjust headlights
33 Test parking light circuit
34 Remove and replace dimmer switch
35 Test turn signal circuit
36 Remove and replace turn signal switch
37 Adjust backup light switch
38 Remove and replace backup light switch
39 Adjust stop light switch
40 Remove and replace stop light switch
41 Check horn circuit
42 Test horn relay
43 Remove and replace horn relay
44 Remove and replace horn
45 Test windshield wiper circuit
46 Remove and replace windshield wiper motor
47 Test constant voltage regulator
48 Remove and replace constant voltage regulator
49 Adjust voltage regulator output
50 Test generator output
51 Test instrument gauges
52 Remove and replace instrument gauges
53 Test sending units
54 Remove and replace sending units
55 Test warning lamps
56 Remove and replace warning lamps

DUTY P: Servicing Electrical Accessories

TASKS: 1 Test cruise control unit
2 Remove and replace cruise control components
3 Test automatic alarm system
4 Remove and replace automatic alarm system components
5 Test radio power circuit
6 Inspect radio speaker
7 Remove and replace radio speaker
8 Test radio antenna
9 Remove and replace radio antenna

10 Trim radio antenna
11 Remove and replace power antenna motor
12 Remove and replace power window motors
13 Remove and replace power seat motors
14 Test cigarette lighter circuit
15 Remove and replace cigarette lighter receptacle
16 Replace radio components
17 Repair windshield wipers
18 Test lighting systems
19 Test electrical shift mechanisms
20 Repair electrical shift mechanisms
21 Repair lighting system

DUTY Q: Servicing Manual Transmissions

TASKS:
1 Inspect and adjust shift linkage
2 Adjust manual clutch
3 Adjust hydraulic clutch free travel
4 Remove and replace extension housing seal and bushing
5 Remove and replace manual transmission
6 Rebuild manual transmission
7 Remove and replace pressure plate assembly
8 Remove and replace clutch release bearing
9 Remove and replace release fork
10 Remove and replace pilot bearing
11 Remove and replace hydraulic clutch slave cylinder
12 Rebuild hydraulic clutch slave cylinder
13 Remove and replace hydraulic clutch master cylinder
14 Rebuild hydraulic clutch master cylinder
15 Measure flywheel runout
16 Replace flywheel
17 Measure bellhousing runout
18 Remove and replace four-wheel-drive transfer case
19 Rebuild four-wheel-drive transfer case
20 Check fluid levels

DUTY R: Servicing Drive Lines

TASKS:
1 Inspect drive line for worn parts
2 Lubricate universal joint
3 Remove and replace universal joint
4 Remove and replace trunnion joint
5 Lubricate speedometer cable
6 Remove and replace speedometer cable
7 Remove and replace speedometer drive gear
8 Remove and replace axle seal
9 Remove and replace axle bearing
10 Balance drive shaft (in car)
11 Remove and replace transmission mount
12 Check drive line angles
13 Remove and replace differential assembly (integral)
14 Remove and replace differential assembly (removable)
15 Rebuild differential assembly (integral)
16 Rebuild differential assembly (removable)

17 Remove and replace transaxle assembly
18 Rebuild transaxle assembly
19 Remove and replace front-wheel-drive axle assemblies
20 Rebuild four-wheel-drive locking hubs
21 Remove and replace pinion seal
22 Rebuild power takeoff
23 Remove and replace drive shaft center support bearings
24 Rebuild constant velocity universal joints
25 Remove and replace constant velocity joints
26 Repack constant velocity joints
27 Remove and replace constant velocity boots

DUTY S: Performing Welding and Oxy-Fuel Cutting

TASKS:
1 Set up oxy-fuel welding and cutting equipment
2 Braze mild steel
3 Solder copper tubing
4 Cut mild steel with oxy-fuel equipment
5 Set up shielded metal arc welding equipment
6 Weld 3/16" mild steel in flat position
7 Weld 3/16" mild steel in horizontal position
8 Solder electrical components and wire
9 Heat metal parts to assist in removal
10 Weld cast iron
11 Braze cast iron

DUTY T: Performing Diesel Engine Tune-Ups

TASKS:
1 Test and adjust air inductor system
2 Test fuel system
3 Adjust injector timing
4 Adjust valve clearance
5 Adjust fuel pressure
6 Adjust control rack
7 Check and adjust linkage for full throttle operation

DUTY U: Performing Safety Practices

TASKS:
1 Apply shop and equipment safety rules
2 Apply first aid procedures
3 Complete an accident report
4 Evaluate personnel safety violations
5 Inspect the workplace for safe working environment
6 Report shop safety violations
7 Correct safety violations
8 Participate in shop safety committee

DUTY V: Performing Preventative Maintenance

TASKS:
1 Perform underside inspections
2 Service crankcase lube
3 Service fuel filter

4 Perform underhood inspections
5 Complete lubrication operations
6 Service tires

DUTY W: Perform Maintenance Control Functions

TASKS:
1 Complete labor time cards
2 Complete requests for procurement of parts
3 Complete unsatisfactory reports
4 Enter work performed on work orders
5 Follow up on requisitions
6 Initiate and complete work order
7 Initiate request for parts
8 Maintain daily work control logs or status boards
9 Plan, schedule and control maintenance of vehicles
10 Prepare reports of vehicle defects
11 Spot check service orders

DUTY X: Performing Precision Measurements

TASKS:
1 Measure parts using standard and metric measurement systems
2 Measure parts with steel rule
3 Measure parts using dial indicators
4 Measure parts using outside micrometers
5 Measure parts using inside micrometers
6 Measure parts using depth micrometers
7 Measure parts using special micrometers
8 Measure parts using inside and outside calipers
9 Measure threads
10 Calibrate precision measuring tools
11 Clean and store precision measuring tools

DUTY Y: Performing Chassis and Cab Maintenance

TASKS:
1 Replace torque arms
2 Repair doors
3 Install windshield, back and side glass
4 Inspect and service hood
5 Inspect and repair mirrors
6 Inspect and service ventilation system
7 Inspect and service seat

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

LOCALLY VALIDATED TASK LIST
A COOPERATIVE EFFORT BETWEEN
THE NATIONAL ALLIANCE OF BUSINESS AND
THE CHICAGO PUBLIC SCHOOLS
OCTOBER 14, 1987

CARPENTER

(* Denotes entry level skills)

Duty A: Applying Safety Practices

TASKS:
- *1 Comply with shop and equipment safety rules
- *2 Apply basic Red Cross emergency first aid techniques
- 3 Complete accident reports
- *4 Inspect workplaces for safe working environment
- *5 Report shop, environmental and equipment safety violations
- *6 Demonstrate use of fire extinguishers
- 7 Participate in disaster control exercises
- 8 Participate in shop safety committees
- *9 Correct safety hazards
- 10 Participate in safety training programs
- 11 Evaluate personnel safety violations

Duty B: Performing Supervisory Functions

TASKS:
- *1 Comply with all applicable local, state and national building codes and regulations
- 2 Determine availability of machines, supplies and materials
- 3 Requisition, schedule and distribute supplies and materials
- 4 Coordinate workers with work to be done
- 5 Schedule and control shop flow of jobs
- 6 Maintain files
- 7 Maintain service records
- 8 Maintain labor records
- 9 Maintain warranty records
- 10 Explain work requirements
- 11 Inventory supplies and equipment
- 12 Maintain charts, tables, graphs or status boards on work scheduled
- 13 Check job/time cards
- 14 Inspect shop equipment and arrange for maintenance and repair work
- 15 Follow up employee reports of problems or equipment failures
- 16 Draft correspondence
- 17 Orient new employees
- 18 Compute average cost rates for work performed
- 19 Determine actual costs of work completed

20 Write work schedules
21 Write technical reports
22 Plan and implement technical training for employees
23 Evaluate employee progress and performance
24 Interview job applicants
25 Hire workers
26 Fire workers
27 Conduct meetings

Duty C: Performing Housekeeping and Recordkeeping Activities

TASKS:
*1 Develop a work portfolio
*2 Clean and maintain work area and leave in safe condition
*3 Follow tool crib procedures
*4 Report problems to supervisor
5 Complete time cards
6 Complete job status reports
*7 Make equipment failure reports
8 Determine basic maintenance procedures using manuals
9 Plan sequence of work operations
10 Use technical references
11 Participate in a participative management program (Quality Circles)

Duty D: Conducting Shop Operations

TASKS:
1 Answer customer questions
2 Troubleshoot customer problems
*3 Perform public relations activities
4 Maintain records of service tools and equipment
5 Unpack and inspect new equipment
6 Receive and store parts and supplies
7 Update parts catalogs
8 Modify wiring diagrams to reflect repair changes
9 Make out material lists used on each job
*10 Complete work orders

Duty E: Estimating Materials

TASKS:
1 Estimate forming materials
2 Estimate concrete
3 Estimate concrete blocks
4 Estimate rough framing materials
5 Estimate roofing materials
6 Estimate windows
7 Estimate doors and jambs
8 Estimate interior underlayment

9 Estimate interior panels
10 Estimate stairway materials
11 Estimate closet accessories
12 Estimate acoustical ceiling materials
13 Estimate prefabricated cabinets
14 Estimate materials for built-ins
15 Estimate finish hardware
16 Estimate siding
17 Estimate cost of jobs including loss of materials and inflation

Duty F: Preparing Building Site

TASKS:
1 Establish elevation reference points from bench mark or datuum point
2 Establish footing grades
3 Locate and square corners
4 Install batter boards
*5 Set grade stakes
6 Lay out buildings using transit

Duty G: Preparing Foundations and Footings

TASKS:
*1 Build footings
2 Build forms for concrete
*3 Waterproof foundations
4 Construct stud and sheathing wall forms
5 Erect plywood panel wall forms
6 Erect manufactured wall forms
7 Construct stair forms
*8 Strip forms
9 Install beams
10 Install bulkheads
*11 Install keyway for footings and foundations

Duty H: Sharpening Tools

TASKS:
*1 Sharpen chisels
*2 Hone plane irons
3 Sharpen saw blades
4 Sharpen twist drills
5 Sharpen auger bits

Duty I: Installing Rough Framing, New and Existing

TASKS:
*1 Stack lumber
2 Install sill plates
*3 Frame walls
*4 Align and brace walls
5 Construct plywood box beams
*6 Install diagonal wind bracing
7 Frame floor openings
*8 Frame door openings

*9 Frame window openings
10 Frame roof openings
11 Frame built-up stringers
12 Frame cleated stair stringers
*13 Install floor joists
*14 Install cross-bridging
*15 Install ceiling joists
16 Construct post and beam frames
17 Install steel beams
18 Install lally posts
*19 Install backing for hanging fixtures and cabinets
*20 Install exterior wall sheathings
*21 Install battens
*22 Install plyscore sub-floors
23 Install diagonal sub-floors
*24 Install underlayment over sub-floors
25 Install metal studs
26 Set metal door frames for masonry construction
27 Set metal window frames for masonry construction
28 Construct roof trusses
29 Install collar beams
30 Install overhang purlins
31 Install rafter support purlins
32 Install ridgeboards
33 Install common rafters
34 Install tail rafters
35 Install cripple jack rafters
36 Install hip rafters
37 Install hip jack rafters
38 Install valley rafters
39 Install valley jack rafters
40 Install gambrel roof rafters
41 Frame dormers without sidewalls
42 Frame dormers with sidewalls
43 Frame roof saddles
44 Frame snub gables
45 Install gable studs
46 Construct intersecting gable roofs
*47 Install roof sheathings
48 Install and construct reinforced header

Duty J: Installing Roof Components, New and Existing

TASKS: *1 Install roofing felts
2 Install chimney flashs
*3 Install valley flashs
*4 Install composite strip shingles
5 Install shingles over dormers or roof appendages
6 Install roof vents
7 Install ridge vents

8 Install skylights
9 Install wood shingles/shakes
10 Install gutters
11 Install downspouts
12 Install cement shingles
13 Install synthetic shingles
14 Install slate shingles
15 Install tile shingles
16 Install parapet flashs and openings

Duty K: Installing and Repairing Exterior Finishes

TASKS:
1 Construct box cornice
2 Construct rake cornice
3 Case exterior opening
4 Install wood jamb window units
5 Hang exterior doors
6 Install exterior door jambs
7 Install metal corners for aluminum or vinyl siding
8 Install corner boards for wood siding
9 Install wood fascia
10 Install wood soffit
11 Install aluminum fascia
*12 Install aluminum soffit
13 Install prefabricated columns
14 Install garage doors
15 Install metal siding
16 Install vinyl siding
17 Install composition siding
*18 Install prefabricated storm doors
*19 Install prefabricated storm windows
*20 Install drip caps
21 Install bevel siding
22 Install lap siding
23 Install wood shingle siding
24 Install outside corners of wood shingle siding
*25 Install panel siding
26 Construct and install wood louvers
27 Install exterior shutters

Duty L: Installing and Repairing Interior Finishes

TASKS:
*1 Install batt insulations
*2 Install vapor barriers
*3 Install wall panels
*4 Assemble prefabricated cabinets
*5 Install closet accessories
*6 Install interior door jambs
7 Construct built-in cabinets
*8 Install shelves
*9 Install baseboards

10 Install ceiling molds
*11 Install drywalls
*12 Case interior openings
*13 Hang interior doors
*14 Install prehung split jamb door units
15 Install double-acting doors
16 Install folding (accordian) doors
17 Install sliding doors
18 Install bi-fold doors
19 Install pocket doors
*20 Install cylinder locksets
*21 Install mortise locksets
*22 Install door closers
*23 Install door holders
24 Install panic bars
*25 Install flush bolts
*26 Install door plates
*27 Install weatherstripping
*28 Install wall cabinets
*29 Install base cabinets
30 Install recessed medicine cabinets
*31 Install thresholds
*32 Install gypsum lathes
*33 Install corner beading for lathes
34 Install plaster grounds
35 Install parquet flooring
36 Install plank flooring
*37 Install tongue and groove flooring
*38 Install suspended T-grid ceiling
39 Install suspended concealed grid ceiling
*40 Install tongue and groove ceiling tiles

Duty M: Assembling, Constructing and Repairing Stairs

TASKS:
1 Install prefabricated stairs
2 Install disappearing stair unit
3 Construct open riser stairs
4 Construct box stairs
5 Install wood newel post, balusters and railings
6 Install metal newel post and railings
*7 Cut a stringer

Duty N: Using Climbing Equipment

TASKS:
*1 Inspect climbing equipment and scaffolds for safety
*2 Set up ladders
*3 Set up ladder jacks and planks
4 Construct outrigger scaffolds
5 Erect metal scaffolds
6 Set up hanging and swinging scaffolds

7 Erect suspended work platforms
8 Set up mobile and powered scaffolds
9 Construct single-pole scaffolds
10 Construct double-pole scaffolds
11 Set up pump jacks

The following are incumbent workers who were involved in a consultant capacity to locally verify this task list.

Michael P. Conroy
NE Construction Co.

Yhoushua Joshua
Metro Stripes

John Overton
Metro Stripes

Ray Overton
Metro Stripes

CARPENTER

Duty A: Applying Safety Practices

TASKS:
1 Comply with shop and equipment safety rules
2 Apply basic emergency first aid techniques
3 Complete accident reports
4 Inspect workplaces for safe working environment
5 Report shop, environmental and equipment safety violations
6 Demonstrate use of fire extinguishers
7 Participate in disaster control exercises
8 Participate in shop safety committees
9 Correct safety hazards
10 Demonstrate cardiopulmonary resuscitation techniques
11 Participate in safety training programs
12 Evaluate personnel safety violations

Duty B: Performing Supervisory Functions

TASKS:
1 Determine availability of machines, supplies and materials
2 Requisition, schedule and distribute supplies and materials
3 Coordinate workers with work to be done
4 Schedule and control shop flow of jobs
5 Maintain files
6 Maintain service records
7 Maintain labor records
8 Maintain warranty records
9 Explain work requirements
10 Inventory supplies and equipment
11 Maintain charts, tables, graphs or status boards on work scheduled
12 Check job/time cards
13 Inspect shop equipment and arrange for maintenance and repair work
14 Follow up employee reports of problems or equipment failures
15 Draft correspondence
16 Orient new employees
17 Compute average cost rates for work performed
18 Determine actual costs of work completed
19 Write work schedules
20 Write technical reports
21 Plan and implement technical training for employees
22 Evaluate employee progress and performance
23 Interview job applicants
24 Hire workers
25 Fire workers
26 Conduct meetings

Duty C: Performing Housekeeping and Recordkeeping Activities

TASKS:
1 Clean and maintain work area and leave in safe condition
2 Follow tool crib procedures
3 Report problems to supervisor

4 Complete time cards
5 Complete job status reports
6 Make equipment failure reports
7 Determine basic maintenance procedures using manuals
8 Plan sequence of work operations
9 Use technical references
10 Participate in a participative management program (Quality Circles)

Duty D: Conducting Shop Operations

TASKS:
1 Answer customer questions
2 Troubleshoot customer problems
3 Perform public relations activities
4 Maintain records of service tools and equipment
5 Unpack and inspect new equipment
6 Receive and store parts and supplies
7 Update parts catalogs
8 Modify wiring diagrams to reflect repair changes
9 Make out material lists used on each job
10 Complete work orders

Duty E: Estimating Materials

TASKS:
1 Estimate forming materials
2 Estimate concrete
3 Estimate concrete blocks
4 Estimate rough framing materials
5 Estimate roofing materials
6 Estimate windows
7 Estimate doors and jambs
8 Estimate interior underlayment
9 Estimate interior panels
10 Estimate stairway materials
11 Estimate closet accessories
12 Estimate acoustical ceiling materials
13 Estimate prefabricated cabinets
14 Estimate materials for built-ins
15 Estimate finish hardware
16 Estimate siding
17 Estimate cost of jobs

Duty F: Preparing Building Site

TASKS:
1 Establish elevation reference points from bench mark
2 Establish footing grades
3 Locate and square corners
4 Install batter boards
5 Set grade stakes
6 Lay out buildings using transit

Duty G: Preparing Foundations and Footings

TASKS:
1 Build footings
2 Build forms for concrete
3 Waterproof foundations
4 Construct stud and sheathing wall forms
5 Erect plywood panel wall forms
6 Erect manufactured wall forms
7 Construct stair forms
8 Strip forms
9 Install beams
10 Install bulkheads
11 Install keyway for footings and foundations

Duty H: Sharpening Tools

TASKS:
1 Sharpen wood chisels
2 Hone plane irons
3 Sharpen circular saw blades
4 Sharpen twist drills
5 Sharpen auger bits

Duty I: Installing Rough Framing

TASKS:
1 Stack lumber
2 Install sill plates
3 Frame walls
4 Align and brace walls
5 Construct plywood box beams
6 Install diagonal wind bracing
7 Frame floor openings
8 Frame door openings
9 Frame window openings
10 Frame roof openings
11 Frame built-up stringers
12 Frame cleated stair stringers
13 Install floor joists
14 Install cross-bridging
15 Install ceiling joists
16 Construct post and beam frames
17 Install steel beams
18 Install lally posts
19 Install backing for hanging fixtures and cabinets
20 Install exterior wall sheathings
21 Install battens
22 Install plyscore sub-floors
23 Install diagonal sub-floors
24 Install underlayment over sub-floors
25 Install metal studs
26 Set metal door frames for masonry construction
27 Set metal window frames for masonry construction
28 Construct roof trusses
29 Install collar beams
30 Install overhang purlins

31 Install rafter support purlins
32 Install ridgeboards
33 Install common rafters
34 Install tail rafters
35 Install cripple jack rafters
36 Install hip rafters
37 Install hip jack rafters
38 Install valley rafters
39 Install valley jack rafters
40 Install gambrel roof rafters
41 Frame dormers without sidewalls
42 Frame dormers with sidewalls
43 Frame roof saddles
44 Frame snub gables
45 Install gable studs
46 Construct intersecting gable roofs
47 Install roof sheathings

Duty J: Installing Roof Components

TASKS:
1 Install roofing felts
2 Install chimney flashs
3 Install valley flashs
4 Install composite strip shingles
5 Install composite shingles on ridge cap
6 Install composite shingles in valley
7 Install composite shingles around roof opening
8 Install shingles over dormers or roof appendages
9 Install roof vents
10 Install ridge vents
11 Install skylights
12 Install wood shingles/shakes
13 Install wood shingles/shakes on ridge cap
14 Install wood shingles/shakes in valley
15 Install wood shingles/shakes around roof opening
16 Install gutters
17 Install downspouts

Duty K: Installing Exterior Finishes

TASKS:
1 Construct box cornice
2 Construct rake cornice
3 Case exterior opening
4 Install wood jamb window units
5 Hang exterior doors
6 Install exterior door jambs
7 Install metal corners for aluminum or vinyl siding
8 Install corner boards for wood siding
9 Install wood fascia
10 Install wood soffit
11 Install aluminum fascia
12 Install aluminum soffit
13 Install prefabricated columns
14 Install garage doors

15 Install metal siding
16 Install vinyl siding
17 Install composition siding
18 Install prefabricated storm doors
19 Install prefabricated storm windows
20 Install drip caps
21 Install bevel siding
22 Install lap siding
23 Install wood shingle siding
24 Install outside corners of wood shingle siding
25 Install panel siding
26 Construct and install wood louvers
27 Install exterior shutters

Duty L: Installing Interior Finishes

TASKS:
1 Install batt insulations
2 Install vapor barriers
3 Install wall panels
4 Assemble prefabricated cabinets
5 Install closet accessories
6 Install interior door jambs
7 Construct built-in cabinets
8 Install shelves
9 Install baseboards
10 Install ceiling molds
11 Hang drywalls
12 Case interior openings
13 Hang interior doors
14 Install prehung split jamb door units
15 Install double-acting doors
16 Install folding (accordian) doors
17 Install sliding doors
18 Install bi-fold doors
19 Install pocket doors
20 Install cylinder locksets
21 Install mortise locksets
22 Install door closers
23 Install door holders
24 Install panic bars
25 Install flush bolts
26 Install door plates
27 Install weatherstripping
28 Install wall cabinets
29 Install base cabinets
30 Install recessed medicine cabinets
31 Install thresholds
32 Install gypsum lathes
33 Install corner beading for lathes
34 Install plaster grounds
35 Install parquet flooring
36 Install plank flooring
37 Install tongue and groove flooring
38 Install suspended T-grid ceiling

39 Install suspended concealed grid ceiling
40 Install tongue and groove ceiling tiles

Duty M: Assembling and Constructing Stairs

TASKS: 1 Install prefabricated stairs
2 Install disappearing stair unit
3 Construct open riser stairs
4 Construct box stairs
5 Install wood newel post, balusters and railings
6 Install metal newel post and railings

Duty N: Using Climbing Equipment

TASKS: 1 Inspect climbing equipment for safety
2 Set up ladders
3 Set up ladder jacks and planks
4 Construct outrigger scaffolds
5 Erect metal scaffolds
6 Construct hanging and swinging scaffolds
7 Erect suspended work platforms
8 Set up mobile and powered scaffolds
9 Construct single-pole scaffolds
10 Construct double-pole scaffolds

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

EMPLOYABILITY SKILLS

DUTY A: Identifying Employment Opportunities

SKILLS:
1 Identify requirements for job
2 Investigate educational opportunities
3 Investigate occupational opportunities
4 Locate resources for finding employment
5 Confer with prospective employers
6 Identify job trends

DUTY B: Applying Employment Seeking Skills

SKILLS:
1 Locate job openings
2 Document skills and abilities (resume)
3 Prepare for interview
4 Participate in interview
5 Complete required tests
6 Complete required forms
7 Write application letter
8 Write follow-up letter
9 Write acceptance letter
10 Evaluate job offer
11 Evaluate job rejection

DUTY C: Interpreting Employment Capabilities

SKILLS:
1 Match interest to job area
2 Match aptitudes to job area
3 Verify abilities
4 Identify immediate work goal
5 Develop career plan

DUTY D: Demonstrating Appropriate Work Behavior

SKILLS:
1 Exhibit dependability
2 Demonstrate punctuality
3 Follow rules and regulations
4 Recognize the consequences of dishonesty
5 Complete assignments in accurate and timely manner
6 Control emotions
7 Assume responsibility for own decisions and actions
8 Exhibit pride and loyalty
9 Exhibit ability to handle pressures and tensions
10 Demonstrate ability to set priorities
11 Demonstrate problem-solving skills

DUTY E: Maintaining Safe and Healthy Environment

SKILLS:
1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
3 Exhibit positive behavior
4 Read current job-related publications
5 Support and promote employer's company image and purpose
6 Maintain appearance to comply with company standards

DUTY G: Maintaining Working Relationships with Others

SKILLS: 1 Work productively with others
2 Show empathy, respect and support for others
3 Demonstrate procedures and assist others when necessary
4 Recognize, analyze and solve or refer problems
5 Minimize occurrence of problems
6 Channel emotional reaction constructively

DUTY H: Communicating on the Job

SKILLS: 1 Read and comprehend written communications and information
2 Use correct grammar
3 Speak effectively with others
4 Use job-related terminology
5 Listen attentively
6 Write legibly
7 Use telephone etiquette
8 Follow written and oral directions
9 Ask questions
10 Locate information in order to accomplish task
11 Prepare written communication
12 Utilize keyboarding skills
13 Utilize computer skills

DUTY I: Adapting to Change

SKILLS: 1 Recognize need to change
2 Demonstrate willingness to learn
3 Demonstrate flexibility
4 Participate in continuing education
5 Seek work challenges
6 Adjust career goals/plan as needed

DUTY J: Understanding How a Business Works

SKILLS:
1 Recognize the role of business in the enterprise system
2 Identify general responsibilities of employees
3 Identify general responsibilities of management/employers
4 Investigate opportunities and options for business ownership
5 Identify planning processes needed to open a business
6 Participate in meetings

DUTY K: Performing Mathematical Skills

SKILLS:
1 Apply mathematics for problem solving
2 Add and subtract whole numbers, decimals and fractions
3 Multiply and divide whole numbers, decimals and fractions
4 Convert numbers between forms expressed as fractions, decimals and percents
5 Convert between standard American units of measure
6 Convert between standard American units and metric units

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.